



# LUNAR & PLANETARY LABORATORY

## Traveling for the University of Arizona

### DOMESTIC TRAVEL

- Before you go:
  - All travel on behalf of the UA by an employee, student or affiliate must be pre-authorized, even if expenses will not be paid by the university. This will ensure that:
    - Travel plans have been authorized by the appropriate departmental approving authority
    - Funds are available
    - The traveler can document their official travel status if needed for Risk Management purposes
    - The trip has a legitimate business purpose; in the best interest of the University
    - The travel meets the IRS Accountable Plan.
- Travel Authorization
  - A travel authorization must be completed by the traveler's admin
  - The form can be found at <http://uabis.arizona.edu/eforms/Launcher.asp?FormID=27>
  - Please provide the following information to your admin in order to complete the form:
    - The business purpose of your trip
    - The location of the trip
    - The funding source
    - Your mode of transportation
    - The meeting/conference dates
    - Your departure/return date
  - If you are planning to include personal time in conjunction with your UA Business trip, you must include that information on your travel authorization.
  - If you will be in travel status for more the 30 days, you are required to submit a long term travel letter approved by the department head. This letter must include the details of your travel and funding source.

- Documents
  - Please provide your admin with the following documents to be included with your travel authorization if you will be attending a conference:
    - A copy of the conference information that shows the dates and location of the conference.
    - A copy of the registration information or program that will show if any meals will be included in the registration.
    - A copy of the accommodations information to determine if your lodging is designated. If this is not included, it will be assumed that your lodging is not designated and you will be reimbursed accordingly.
      - For those traveling to meet with collaborators or other meetings, a written notice (email) from your collaborator or meeting organizer suggesting a hotel is sufficient documentation for a designated hotel.
  - CAUTION: If your travel authorization is not in place before your trip, this is considered a violation of policy and you will not be covered by UA insurance. You may not be reimbursed for your travel expenses or your reimbursement may be significantly delayed.
  - Planning your travel
    - Plans must be made using the most economical means of travel. In most cases, this means by air. If you are traveling by vehicle out of state, you will need to justify the reason (carrying field equipment, carpooling to a conference, etc.). If you are carpooling, please list the people who will be traveling with you and their travel authorization numbers.
    - To help plan your expenses, please use the meals and lodging cost index at <http://policy.fso.arizona.edu/fsm/1400/1413>. This index will tell you what meal and lodging per diems are at your destination. Please note: meal per diem must be approved by your supervisor before your travel.
    - If you are taking personal time in conjunction with your business trip and will be flying, per department policy, you must buy your ticket using personal funds and then get reimbursed. When you book your flight, also print out a comparison flight for the trip directly to your destination and then directly back to Tucson after the event. You will be reimbursed for the least expensive fare.
  - While you are gone
    - Request and keep all original receipts
      - NOTE: Expenses from missing original receipts may be subject to taxation
    - Lodging must be with a commercial establishment. The original itemized receipt is required showing the establishment's name, address, phone number, dates of lodging, daily room rate, amount of tax, zero balance and method of payment.
    - If you are sharing a room, pay your share separately and get the itemized receipt showing how much and how you paid.

- If you are requesting meal per diem, it is not necessary to keep the receipts for meals. Before you travel, your supervisor will need to verify how much meal per diem, if any, is allowed.
  - If you have receipts for field supplies, please note what the items are and what they will be used for.
  - If you are renting a car, please decline the CDW insurance coverage. The rental car will be covered by U of A insurance. \*Accept the CDW if you are under the age of 25.
    - Note: depending on your travel plans and business purpose, you may want to consider renting a Motor Pool vehicle. Contact MP (621-5124) for information regarding rental of MP vehicles.
  - Request an itemized receipt from the car rental company that shows the dates of use and that payment was made.
  - Retain all gas receipts for the rental car. Make sure the receipt is itemized.
  - Receipts for taxis are not required, but preferred. If at all possible get a receipt from the cab driver. \*Foreign taxi receipts are required.
- After the trip
  - Make sure to give your admin the following information:
    - All receipts (itemized)
    - Date and time of departure and date and time of return (if not traveling by air)
    - Description of any circumstances which may impact the reimbursement (plane delayed, etc.)
    - Note if you are requesting meal per diem
  - **IMPORTANT:** Reimbursement requests submitted within 90 days will be considered qualified and nontaxable under the accountable plan. Reimbursement requests submitted after the 90th day will generally be nonqualified and taxable to the payee. Nonqualified reimbursements are processed through payroll to collect the appropriate taxes and remitted to the IRS.

## INTERNATIONAL TRAVEL

- In addition to all the required information/instructions above, the following information for international travel is required prior to travel:
  - Forms to be completed:
    - University International travel registry <https://ua-risk.terradata.com>
      - Additional forms may need to be completed based on trip details
- Travel to countries under a US State Department Travel Warning
  - For those who will be traveling to a country with a US State Department travel warning, there are extra forms to be filled out.

- Travel Supplement Authorization for Travel Warning Areas ([http://uabis.arizona.edu/eForms/Forms/iTA\\_Supp\\_Auth\\_Travel\\_Warning\\_Areas.pdf](http://uabis.arizona.edu/eForms/Forms/iTA_Supp_Auth_Travel_Warning_Areas.pdf))
- Travel Assumption of Risk and Release ([http://uabis.arizona.edu/eForms/Forms/iTravel\\_Assump\\_of\\_Risk\\_Release.pdf](http://uabis.arizona.edu/eForms/Forms/iTravel_Assump_of_Risk_Release.pdf))
  - The assumption of risk form is only for students or volunteers traveling to a country under a travel warning.
- The Travel Supplement Authorization form must be submitted with a completed travel authorization form. The information will be reviewed by the International Travel Safety Oversight Committee and make their recommendation to the Provost. To allow sufficient time for this process, please submit the forms at least 30 days prior to planned departure.
- Exceptions to Policy
  - Per policy, a traveler who rents a car is to waive insurance fees as the U of A insurance applies. However, because laws differ from country to country, if you are renting a car in a foreign country, you will be required to accept the insurance for that country from the rental agency.
  - The U of A does not ordinarily pay for phone charges on a personal phone. However, if you are making business calls on your cell phone, you may be reimbursed. These expenses must be approved by your supervisor before the travel begins.

#### CAUTION!

- Domestic or International Travel:
  - When you are traveling, you must pay your own expenses only. We may not be able to reimburse you for payment you make on behalf of another party.
  - If you have any questions about what you can/can't do, ASK FIRST!!!