What You Need to Know

• General overview of travel at NC State
• Travel Authorizations
• Travel Reimbursements
• Specific requirements
• Pitfalls to avoid
• Special circumstances
Travel Authorizations

When do you need one?
• When you travel for University-related purposes
• EVEN IF you do not need reimbursement
• At least 2 weeks before travel

Why do you need one?
• Liability/Insurance

Non-employee students: AP104 form
• At least 2 weeks prior to travel – DH approval required
Travel Reimbursements

When do you need one?
• Whenever you have a Travel Authorization
• If authorization in place but no reimbursement is needed, must email Darlene

Why do you need one?
• To get your money back!

BME Staff enters travel reimbursements, do NOT enter your own!
Travel Timeline

Travel Authorization
At least 2 weeks prior to travel

Travel

Travel Reimbursement
Receipts turned in immediately upon return

Approval Process and Payment
2-4 weeks
Transportation: Planes, Trains, and Automobiles

• Flights
  • Coach fares
  • Business Class only allowed for international flights
  • The University will NOT reimburse for travel insurance (in most cases)

• Trains

• Taxis

• Rental Cars
  • Must have prior DH approval
  • Must be booked through NC State vehicle rental program

• Mileage
  • Must calculate distance based on home or work address, whichever is less

• Parking

Anything that requires Department Head signature/approval needs to be turned into Darlene West – NOT Dr. Dayton!
Lodging

• Should be a COMMERCIAL LODGING ESTABLISHMENT

• What does this even mean?
  • 1. Company
  • 2. Hotel or motel
  • 3. When sharing a room, you MUST pay your portion separately and submit a receipt with your name and portion listed (this can be done at hotel check out).

• Avoid AirBnB, VRBO, etc
  • These are owned by individuals and are not considered “commercial”.
  • Only allowed with PRIOR University approval IF it can be shown that it is a significant cost savings over a hotel
  • Prior approval must be granted (can take 6-8 weeks).
Conference Registration

• Reimbursed at cost
• Typically, no receptions or banquets can be reimbursed
• Typically, no membership fees
Meals

- Reimbursed as per diem ONLY
  - $10.10 breakfast
  - $13.30 lunch
  - $23.10 (in state)/$26.30 dinner (out of state/country)
- Cannot receive over this amount
- Must have PI approval prior to travel
- 1-day travel: no meals reimbursed
- No receipts needed
- No reimbursement for meals provided by hotel, conference, etc
- No room service allowed
Pre-Travel Reimbursement

• Flights
• Conference Registration

Alternatively…
Department can set up your flight ahead of your trip!
If you are an employee with access to Travel Center in MyPack: Travel Authorization
Travel Authorization

Authorization ID: NEXT

Traveler: Lauren Brittany Jones
Biomedical Program Engineering

Department: SUBRAYA
Subra R. Balasubramaniam

Travel Type: Individual
Begin Date: 01/01/2018
Begin Time: 5:00 AM (or 8:00 AM)
End Date: 01/08/2018
End Time: 8:00 PM (or 5:00 PM)

Purpose: American Association of Physical Anthropology Conference
Category: Conferences/Workshops

Destinations: Non U.S. Travel (Out-of-Country)
City: Las Vegas
State: NV Nevada

Will this trip include any personal travel? No
Comments:

No Reimbursement Needed

Transportation

<table>
<thead>
<tr>
<th>Description</th>
<th>Estimated Amount</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mileage</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Airfare/Taxes</td>
<td>699.00</td>
<td></td>
</tr>
<tr>
<td>Baggage/Other Fees</td>
<td>196.00</td>
<td></td>
</tr>
<tr>
<td>Parking</td>
<td>296.00</td>
<td></td>
</tr>
<tr>
<td>Taxi</td>
<td>56.00</td>
<td></td>
</tr>
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</table>

Lodging

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<tr>
<th>Description</th>
<th>Estimated Amount</th>
<th>Comments</th>
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Must be correct before you submit.
If you are a non-employee student:
AP 104

<table>
<thead>
<tr>
<th>Traveler's Name (Last/First/Middle)</th>
<th>Traveler's Vendor Number</th>
<th>Name/Number of Contact Person</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel Start Date (Destination)</td>
<td>Travel Begin Date</td>
<td>Travel End Date</td>
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</tbody>
</table>

Explain what the travel is for (Please be specific and do not use acronyms):

Select the service/benefit provided to the University by this trip:

- [ ] [ ] [ ] [ ] [ ]

Is the non-employee traveler a student?
- [ ] Yes
- [ ] No

Is this travel for In-State, Out-State or Out-of-Country?
- [ ] In State
- [ ] Out-State
- [ ] Out-of-Country

Is the traveler a non-resident alien?
- [ ] No
- [ ] Yes

If a non-resident alien, please mark "yes" in the box above. If not, continue to the Travel Commitment section.

- [ ] In State
- [ ] Out-State
- [ ] Out-of-Country

<table>
<thead>
<tr>
<th>Travel Commitment (by Expense Type)</th>
<th>Specific Authorizations (Select Yes or No)</th>
<th>Projected Expenses</th>
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Travel Reimbursements
What to do When you Return

• You'll receive a WELCOME BACK EMAIL from Darlene.
• Provide receipts/required info to Darlene per email instructions
• What do you need?
  • Beginning/End Date of Trip
  • Beginning/End Time of Trip
  • Airfare receipt
  • Baggage receipt
  • Mileage information – including directions
  • Conference Registration form/receipt
  • Agenda
  • Specify which meals were covered
  • Lodging Folio – signed and dated
  • Transportation receipts

Two weeks (10 business days)
Travel Reimbursement

Reimbursement ID: TR01452681
Traveler: Ashley Carson Brown
Department: Biomedical Program-Engineering
Supervisor ID: JPODALY John P. O'Daly

Reference Number: 
Authorization ID: TA00156490
Blanket Auth ID: 
Authorization Amount: $1152.90
Voucher ID: 04341540

1. Basic Travel Details
   - Travel Type: Individual
   - Begin Date: 11/12/2016
   - End Date: 11/16/2016
   - Begin Time: 09:56 AM
   - End Time: 06:00 PM
   - Purpose: To present at the American Society for Matrix Biology Meeting
   - Destinations: This Trip Includes Non-U.S. Travel (Out-of-Country)
     - City: St. Petersburg
     - State: FL Florida

Comments:

2. Authorization Details

Special Authorizations
- Use of Personal Vehicle
- Excess Lodging Rates
- Overnight Travel (including Lodging and Meals)
### Transportation

<table>
<thead>
<tr>
<th>Description</th>
<th>Authorized Amount</th>
<th>University Paid</th>
<th>Reimburse Me</th>
<th>Status</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airfare/Taxes</td>
<td>180.00</td>
<td></td>
<td>172.20</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taxi</td>
<td>100.00</td>
<td></td>
<td>22.58</td>
<td></td>
<td>Hotel to airport, 11/16</td>
</tr>
<tr>
<td>Taxi</td>
<td>19.54</td>
<td></td>
<td>19.54</td>
<td></td>
<td>Home to RDU taxi, 11/12</td>
</tr>
<tr>
<td>Taxi</td>
<td>66.72</td>
<td></td>
<td>66.72</td>
<td></td>
<td>Airport to hotel, Tampa, 11/12</td>
</tr>
<tr>
<td>Taxi</td>
<td>25.97</td>
<td></td>
<td>25.97</td>
<td></td>
<td>RDU to home, 11/16</td>
</tr>
</tbody>
</table>

### Lodging

<table>
<thead>
<tr>
<th>Description</th>
<th>Authorized Amount</th>
<th>University Paid</th>
<th>Reimburse Me</th>
<th>Status</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lodging Fees/Taxes</td>
<td>700.00</td>
<td></td>
<td>700.00</td>
<td></td>
<td>11/12-11/16, receipt minus room service charge</td>
</tr>
</tbody>
</table>

### Conference Fees & Meals

<table>
<thead>
<tr>
<th>Description</th>
<th>Authorized Amount</th>
<th>University Paid</th>
<th>Reimburse Me</th>
<th>Status</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meals</td>
<td>172.50</td>
<td></td>
<td>104.50</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Other Expenses

- Total Out-of-Pocket Expenses: $1,112.51

I certify that I have incurred the expenses claimed above for the business purpose as listed and that I have not received or anticipate other reimbursement for the amounts claimed.

### My Receipts

Receipts are required for the following items. Select the information button if you need help uploading your receipts.

**Option A: Upload receipts as a group (Multiple Receipt Categories) or by individual receipt type.**

<table>
<thead>
<tr>
<th>Travel Expense Type</th>
<th>Amount</th>
<th>* Upload from File</th>
<th>Receipt (Select to View)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRAVEL crudetor</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Airfare/Taxes</td>
<td>172.20</td>
<td><img src="#" alt="Upload Receipt" /></td>
<td>TR81452881.PDF</td>
</tr>
<tr>
<td>Taxi</td>
<td>22.58</td>
<td><img src="#" alt="Upload Receipt" /></td>
<td></td>
</tr>
<tr>
<td>Taxi</td>
<td>19.54</td>
<td><img src="#" alt="Upload Receipt" /></td>
<td></td>
</tr>
<tr>
<td>Taxi</td>
<td>66.72</td>
<td><img src="#" alt="Upload Receipt" /></td>
<td></td>
</tr>
</tbody>
</table>
Receipt Specifics: Airfare

- Must have full itinerary
- Must have proof of payment
- If no proof of payment, must include copy of bank/credit card statement
Proof of Payment

Receipt Specifics: Airfare

Passenger Info
NAME ASHLEY BROWN
SkyMiles #***********341
Silver

Visit delta.com or use the Fly Delta app to view, select or change your seat.
If you purchased a Trip Extra, please visit My Trips to access a receipt of your purchase.

Flight Receipt
Ticket #: 0682358175477
Place of Issue: Delta.com
Ticket Issue Date: 12SEP16
Ticket Expiration Date: 12SEP17

METHOD OF PAYMENT
vp********** 1234 $172.20 USD

CHARGES
Air Transportation Charges
Base Fare $133.96 USD

Taxes, Fees and Charges
United States - Flight Segment Tax (2P) $6.00 USD
United States - September 11th Security Fee $11.20 USD
Fee(Passenger Civil Aviation Security Service Fee) (AY)
United States - Passenger Facility Charge (XF) $9.00 USD
United States - Transportation Tax (US) $10.04 USD

TICKET AMOUNT $172.20 USD
Faculty/PI Responsibility

- PIs are responsible for determining the appropriate account to charge travel to
  - If student is paid on a specific grant, their travel CANNOT be reimbursed from another grant (but can be from startup)
  - If student paid from startup but you want to charge travel to grant, that effort has to be added as unpaid effort on the grant as cost share (Rekha)
- Travel MUST BE related to account project
  - HUGE audit concern
  - Double-check account on all travel before approving Authorization
- For student/staff travel: review and approve all costs
  - Let Darlene/Admin know if you won’t reimburse meals
- International travel should be included at proposal stage
  - Granting agencies question why you are adding it after the fact
Special Circumstances

• International Travel
  • Staff will convert to USD based on OANDA Historical Rates unless you provide bank statement with change fees

• Employees or students who are being reimbursed from multiple sources need to talk with Darlene prior to entering TA
  • Travel Awards, multi-department PI—all information regarding awards/multi-department payments should be emailed to Darlene