

**NC STATE**  
UNIVERSITY

**JOINT DEPARTMENT OF  
BIOMEDICAL ENGINEERING**



THE UNIVERSITY  
*of* NORTH CAROLINA  
*at* CHAPEL HILL

# NC State Travel Training



# What You Need to Know

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





A vintage-style map of Australia is the background for the top left. A wooden compass with a metal face is positioned over the map. A fountain pen with a wooden barrel and a silver nib lies diagonally across the map. The map shows various geographical features and place names, including 'AUSTRALIA', 'SOUTH AUSTRALIA', 'NEWCASTLE', 'SYDNEY', and 'BANKS STR.'.

# 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?

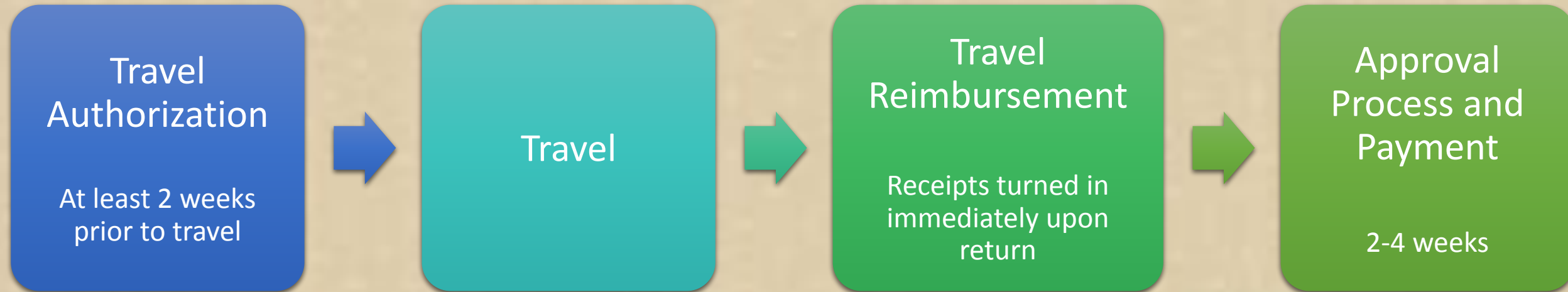
- Whenever you have a Travel Authorization
- If authorization in place but no reimbursement is needed, must email Darlene

Why do you need one?

- To get your money back!

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

# Travel Timeline



# 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



A hand is shown from the top, dropping a coin into the top of a pink piggy bank. The piggy bank has a smiling face with two large, dark eyes. The background is a soft, out-of-focus light pink.

# 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

## Campus Resources

- [Gmail](#)
- [Academics](#)
- [Campus Life](#)
- [Computing](#)
- [Course Information Management](#)
- [DASA Resources](#)
- [Facilities](#)
- [Financial](#)
- [HR](#)
- [Library](#)
- [Security Access / SAR](#)
- [PeopleAdmin](#)
- [University Dining](#)
- [University Advancement](#)

## Online Bulletin - Home

- [Dash To Give 2017 Buchdahl Lecture](#)
- [Engineering Ranks High in Diverse Grads](#)
- [Carrying Water for a Cause](#)
- [The Importance of African-American Speech: a Q&A with Walt Wolfram](#)
- [Survey: Corporate Risks Rising – But Risk Management Efforts Not Keeping Pace](#)
- [Documentary Explores the Historical, Cultural Importance of African American Speech](#)
- [Immigration Topic of History Weekend](#)
- [Celebrate Graduate Research](#)
- [DELTA Grants Proposals Open for](#)

## Employee Self Service

**Launch Employee Self Service**  
Welcome to the new Employee Self Service. In addition to an improved look and feel, you can now use mobile devices with the most common features.

**Learn all about the new ESS**  
View introductory videos and help.

**New Hire Checklist**  
New Hire Checklist

## Financial Systems - Summary

[Assets & Surplus](#)

[Journals & Chartfield Maint.](#)

[MarketPlace](#)

[Monitoring Tools & Reports](#)

[Procurement](#)

[Training](#)

[Travel](#)

[Voucher & Supplier Maintenance](#)

[Hours of Availability](#)

[Financial Systems Help](#)

[View Worklist](#)

## Manage My Projects

[Proposals & Project Management](#)

[Compliance](#)

[Environmental Health & Safety](#)

[Intellectual Property](#)

[Resources](#)

For more information, visit the homepage for [Contracts & Grants](#) or [SPARCS](#).

## Manage My Students

### Faculty Services

- [Graduate Advising](#)
- [Graduate Application Review](#)
- [Undergraduate Advising](#)
- [Advisor Center](#)
- [Advising Dashboard](#)
- [Faculty Center](#)
- [Worklist](#)
- [Worklist](#)

### Course Resources

- [Course Reserves](#)
- [WebAssign](#)
- [WolfWare](#)



## Travel Authorization

Authorization ID: **NEXT**

Authorization Status: Open

[Travel Center](#)

Traveler: **Lauren Brittany Jones**

Reference Number:

[Show Traveler Details](#)

Department: Biomedical Program-Engineering

Supervisor ID:

[Travel Summary](#)

### 1 Basic Travel Details

\*Travel Type:

\*Begin Date:   (ex: 8A or 8:00AM)

\*End Date:   (ex: 5P or 5:00PM)

Purpose:

Category:

\*Destinations:  Non U.S. Travel (Out-of-Country)

City:  State:

Will this trip include any personal travel?

Comments:

### 2 My Estimated Expenses

No Reimbursement Needed

#### Transportation

Description	Estimated Amount	Comments	Comment History
Mileage		<input type="text"/>	<input type="button" value="+"/>
Airfare/Taxes	600.00	<input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>
Baggage/Other Fees	100.00	<input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>
Parking	200.00	<input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>
Taxi	50.00	<input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>

#### Lodging

Description	Estimated Amount	Comments	Comment History
			<input type="button" value="+"/>

## Lodging

Description	Estimated Amount
Lodging Fees/Taxes	1,050.00
Internet	
Photocopy Charges	

## Conference Fees & Meals

Description	Estimated Amount
Conference/Registration Fees	300.00
Workshop/Training Fees	
Meals	206.70
Excess Meals	

Other Expenses

**Authorized Amount: \$2,506.70**

## Special Authorizations

- Use of Personal Vehicle
- Vehicle Rental
- Excess Lodging Rates

## Travel Authorization

### Meals Estimate

Click on meals to be excluded because they were included in the hotel rate, conference registration or paid by an external entity.

Day of Week	Travel Date	Exclude Breakfast	Exclude Lunch	Exclude Dinner	Daily Amount	Rate Type	Breakfast Amount	Lunch Amount	Dinner Amount
Monday	01/01/2018	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$40.50	Out-State	\$8.30	\$10.90	\$21.30
Tuesday	01/02/2018	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$21.30	Out-State			\$21.30
Wednesday	01/03/2018	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$21.30	Out-State			\$21.30
Thursday	01/04/2018	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$21.30	Out-State			\$21.30
Friday	01/05/2018	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$21.30	Out-State			\$21.30
Saturday	01/06/2018	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$21.30	Out-State			\$21.30
Sunday	01/07/2018	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$40.50	Out-State	\$8.30	\$10.90	\$21.30
Monday	01/08/2018	<input type="checkbox"/>	<input type="checkbox"/>		\$19.20	Out-State	\$8.30	\$10.90	

Exclude All Include All

Total Estimated Meals \$ 206.70

OK

3

## Document Upload

### Please Upload the Conference/Workshop/Meeting Agenda When Applicable

An agenda must be provided to substantiate the reimbursement of meals. Save this request before uploading.

Upload from File Document (Select to View)

Upload Document

Must be correct before you submit

4

## Funding Source

Your reimbursement will be paid from the following funding source.

Project ID	Description	Amount	Percent	
201559	SOCIOLOGY & ANTHROPOLOGY/ACD AF//REG TRM INST	\$2506.70	100.00	<input type="button" value="+"/>



# If you are a non-employee student: AP 104

N C State University - Non-Employee Travel Authorization Form (AP104)			
(This form has embedded drop down boxes. If you click on a box and you see an arrow that means it has a drop down list to select from. Otherwise you will need to key in the requested information.)			
		Q&As	Rules
Traveler's Name (Last/First/Middle)	Traveler's Vendor Number	Name/Number of Contact Person	
Travel To (Destination)	Travel Begin Date	Travel End Date	
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:	[ Click on this box and select from the drop down list ]		
Is the non-employee traveler a student?		Yes	
Is this travel for In-State, Out-of-State or Out-of-Country?		In State	
Is traveler a non-resident alien?		If a non-resident alien, indicate visa type.	
If a non-resident alien, please mark "yes" in the box above. If not, continue to the Travel Commitment section.			
Controller's Office Tax Receipts:		OK	
<b>Travel Commitment (by Expense Type)</b>		<b>Specific Authorizations (Select Yes or No)</b>	
Mileage		Over-Night Travel (including lodging and meals)	Yes
Vehicle Rental		Excess Lodging Rates	Yes
Parking		Excess Meals For International Trips	No
Other Ground Transportation		Business Class Airfare For International Trips	No
Conference Registrations		Vehicle Rental	No
Lodging		Use of Private Vehicle	Yes
Meals		Attendees for Handicapped Employees	No
Other Travel Expenses		Other Departmental Items (explain):	
<b>Total Projected Expenses</b>	<b>0.00</b>		

FOR OUT OF UNITED STATES TRAVEL ONLY				
If travel is for out of the United States, Please answer the following questions. Questions 1 & 2 must be answered "yes" and question 3 either "yes" or "na". If you need to consult someone regarding these questions contact the Compliance Officer at SPARCS! If travel is within the United States only, this section is not applicable, go to the traveler's certification.				
List of Countries	Please note the country you are traveling to in the box to the right			
1 - Have you reviewed the SPARCS web site regarding federal laws regarding export controls and acknowledge your personal responsibility to comply with those laws and the personal consequences of failure to comply? (See links below)				
2 - Have you reviewed the U.S. Secretary of State's web site and the Center for Disease Control (CDC) web site for Travel Warnings regarding Health and Safety factors? (See links below)				
3 - If you plan to handle animals or visit farm or animal facilities, have you contacted the Institutional Animal Care and Use Committee (IACUC) web site regarding such activities and acknowledge your personal responsibility to comply with the guidelines, policies and procedures as outlined on that web site and the personal consequences of failure to comply? (See links below)				
SPARCS	US Secretary of State	CDC	Homeland Security	IACUC
<b>Compliance Officer for Integrity, Objectivity and Security in SPARCS</b>				
Signature by the traveler indicates that he/she certifies that the information provided in this request is true and accurate and acknowledges that reimbursement is subject to university travel policy and for the documented service/benefit to the University.				
Traveler Certification (Signature/Date):				
<b>For Department Use Only</b>				
If for a student, are state appropriated funds being committed for this travel authorization?				Yes
If yes, the travel must be at the the department's request for "Official State Business" as defined in PRR REG 07.85.03 and not for activities supported by student activity funds, athletic program funds, student auxiliary funds, study abroad funds, contract and grant funds, student fund-raising activity funds, or activities that constitute a personal benefit to the student such as travel for an academic/course requirement not covered by an approved special fee deposited in State funds. Please select the reason for committing State funds from the following drop down box:				
[ Click to select the reason for committing State funds from this drop down box: ]				
Department Comments:				
Department Head Approval (Name/ Signature /Date): (When travel is for a student and State funds are committed, the Department Head must approve directly and may not delegate authorization responsibility.)				
Accounting Information: (Project(s) and Percentage must be completed)				
Project(s) to be charged:				Trp #
Percentage	100.00%			
Amount	0.00	0.00	0.00	0.00

# 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



Two weeks  
(10 business days)

- Specify which meals were covered
- Lodging Folio – signed and dated
- Transportation receipts



## Travel Reimbursement

Reimbursement ID: **TR01452681**

Traveler: **Ashley Carson Brown**

Department: Biomedical Program-Engineering

Supervisor ID:  John P. O'Daly

Reference Number:

Authorization ID:  

Blanket Auth ID:


Authorization Amount: \$1152.90

Voucher ID: 04341540

 [Travel Center](#)

 [Travel Guidelines](#)

 [Show Traveler Details](#)

 [Travel Summary](#)

### 1 Basic Travel Details

\*Travel Type:  ▾

\*Begin Date:  \*Begin Time:

\*End Date:  \*End Time:

\*Purpose:

\*Destinations:  This Trip Includes Non-U.S. Travel (Out-of-Country) [Currency Converter](#)

City	State	
St. Petersburg	FL	Florida

Comments:

#### ▼ Authorization Details

Additional Information:

Personal Travel Destinations/ Dates:

#### Special Authorizations

- Use of Personal Vehicle
- Excess Lodging Rates
- Overnight Travel (including Lodging and Meals)

2

### My Out-of-Pocket Expenses

DO NOT CLAIM ANY EXPENSES THAT HAVE ALREADY BEEN PAID BY THE UNIVERSITY.

Error History

#### Transportation

Description	Authorized Amount	University Paid	Reimburse Me	Status	Comments	Comment History
Airfare/Taxes	180.00		172.20			
Taxi	100.00		22.58		Hotel to airport, 11/16	
Taxi			19.54		Home to RDU taxi, 11/12	
Taxi			66.72		Airport to hotel, Tampa, 11/12	
Taxi			25.97		RDU to home, 11/16	

#### Lodging

Description	Authorized Amount	University Paid	Reimburse Me	Status	Comments	Comment History
Lodging Fees/Taxes	700.00		700.60		11/12-11/16, receipt minus room service charge	

#### Conference Fees & Meals

Description	Authorized Amount	University Paid	Reimburse Me	Status	Comments	Comment History
Meals	172.90		104.90			

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.

3

### 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.

Travel Expense Type	Amount	* Upload from File	Receipt (Select to View)		
Multiple Receipt Categories			TR01452681.PDF	+	-
Airfare/Taxes	172.20	Upload Receipt		+	
Taxi	22.58	Upload Receipt		+	
Taxi	19.54	Upload Receipt		+	
Taxi	66.72	Upload Receipt		+	





# 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

**DELTA**

Hello, ASHLEY

SkyMiles® #\*\*\*\*\*341 >

Your Trip Confirmation #: JOZO4G

**MANAGE MY TRIP >**

<b>Sat, 12NOV</b>	<b>DEPART</b>	<b>ARRIVE</b>
DELTA 6212* MAIN CABIN (E)	RALEIGH-DURHAM, NC 11:56am	TAMPA, FL 1:57pm
<b>Wed, 16NOV</b>	<b>DEPART</b>	<b>ARRIVE</b>
DELTA 6212* MAIN CABIN (E)	TAMPA, FL 2:33pm	RALEIGH-DURHAM, NC 4:25pm

\*Flight 6212 Operated by GOJET AIRLINES DBA DELTA CONNECTION  
\*Flight 6212 Operated by GOJET AIRLINES DBA DELTA CONNECTION

# Receipt Specifics: Airfare

## Passenger Info

NAME	FLIGHT	SEAT
ASHLEY BROWN	DELTA 6212	Select Seat
SkyMiles #*****341	DELTA 6212	Select Seat
Silver		

Visit [delta.com](http://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 #: 0062356175477  
Place of Issue: Delta.com  
Ticket Issue Date: 12SEP16  
Ticket Expiration Date: 12SEP17

## METHOD OF PAYMENT

VJ\*\*\*\*\* 1234 **\$172.20 USD**

Proof of Payment

## CHARGES

### Air Transportation Charges

Base Fare \$133.96 USD

### Taxes, Fees and Charges

United States - Flight Segment Tax (ZP) \$8.00 USD

United States - September 11th Security \$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**



# Lodging Receipt (Folio)



333 FIRST STREET SOUTH  
SAINT PETERSBURG, FL 33701  
United States of America  
TELEPHONE 727-894-5000 • FAX 7278947655  
Reservations  
www.hilton.com or 1 800 HILTONS

Brown, Ashley  
911 OVAL DRIVE  
RALEIGH NC 27606  
UNITED STATES OF AMERICA

Room No: 715/K1  
Arrival Date: 11/12/2016 3:10:00 PM  
Departure Date: 11/16/2016 7:57:00 AM  
Adult/Child: 1/0  
Cashier ID: TDORR  
Room Rate: 155.00  
AL.  
HH # 451228196 BLUE  
VAT #  
Folio No/Che 717532 A

Confirmation Number: 3265925059

HILTON - SAINT PETERSBURG 11/16/2016 7:56:00 AM

DATE	DESCRIPTION	ID	REF NO	CHARGES	CREDIT	BALANCE
11/12/2016	GUEST ROOM	SERGIO	4191173	\$155.00		
11/12/2016	TAXES	SERGIO	4191173	\$20.15		
11/13/2016	<del>ROOM SERVICE</del>	<del>LINTR</del>	<del>4191558</del>	<del>\$21.40</del>		
11/13/2016	GUEST ROOM	SERGIO	4192074	\$155.00		
11/13/2016	TAXES	SERGIO	4192074	\$20.15		
11/14/2016	GUEST ROOM	SERGIO	4192847	\$155.00		
11/14/2016	TAXES	SERGIO	4192847	\$20.15		
11/15/2016	GUEST ROOM	SERGIO	4193573	\$155.00		
11/15/2016	TAXES	SERGIO	4193573	\$20.15		
11/16/2016	VS 1234	TDORR	4193767		(\$722.00)	

You have earned approximately 6414 Hilton HHonors points for this stay. Hilton HHonors(R) stays are posted within 72 hours of checkout. To check your earnings or book your next stay at more than 3,900

Thank you for choosing Hilton. You'll get more when you book directly with us - more destinations, more points, and more value. Book your next stay at hilton.com.

CREDIT CARD DETAIL  
APPR CODE 00459D MERCHANT ID 84525  
CARD NUMBER VS EXP DATE 07/19  
TRANSACTION ID 4193767 TRANS TYPE Sale

*Ashley Brown*  
11-16-16

Signed and dated

# 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