

THE UNIVERSITY OF ARIZONA,

Center for Gamma-Ray Imaging

TRAVEL PLANNING WORKSHEET

Please complete at least 3 weeks before your trip(Unless Foreign Travel)*

Name: _____

Employee ID Number: _____

Dates of Travel: _____

Dates of Conference: _____

Destination: City: _____ State: _____ *Country: _____

*Need to be submitted 6 months in advance of travel.

Days of Personal time (if any): _____

Purpose of travel: _____

Abstract Title/Authors: _____

Estimated Costs:

Registration fee: _____ How paid? _____

Airfare: _____ How paid? _____

*Meal Per Diem: _____ #days x _____ amount per day (Liz and I will complete)

Lodging: _____ Designated: Yes No

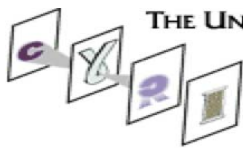
Local Transportation (Taxis, airport shuttles, subways, etc): _____

Rental Car: Yes No If yes, Gasoline: _____

Tolls/parking: _____

Other Miscellaneous fees: _____

If student, Mentor Signature: _____



GUIDELINES FOR TRAVEL PLANNING AND REIMBURSEMENT

Contact: Merry Warner, warnerm@email.arizona.edu, 626-2606 or Liz Hague, lizh@radiology.arizona.edu, 626-7848

Important: Based on new Univ of Arizona guidelines, if you do not have a travel authorization submitted to the Travel office, before you leave for the trip, they will not reimburse the expenses.

BEFORE THE TRIP/TRAVEL AUTHORIZATION Form

1. **Travel Planning Worksheet.** Complete when you have your travel dates confirmed. We use this information to prepare the Travel Authorization, which is an official UA document. We will notify you when the Travel Authorization Form is ready. It should be signed by your research mentor at the very bottom of the form. When completed, the form must be turned in to one of us.
2. **Paying for Conference Registration and Airfare.** The PCard CAN be used to pay for conference registrations and airfare in advance. Conference meals cannot be paid for with PCard. PCards **CANNOT** be used for any other travel expenses. Other expenses are paid by you on your personal credit card or other method. **KEEP ALL RECEIPTS AND INVOICES** except meal receipts. When you return from your trip, bring me all your original receipts. If you are traveling to a conference or other scientific meeting, the Travel Office also requires documentation of the dates and title of the conference. Printing this from a website is fine.

Abstracts. Either a copy of your submitted abstract or the title and authors needs to be provided.
3. **Shared Lodging.** Sharing rooms is great for saving funds but be sure to get a receipt upon checkout that has your name on it. If your roommate's name is the only name on the receipt, you will not be able to be reimbursed. Never pay for someone else's expenses and expect reimbursement from a UA account.
4. **Meal Per Diem.** Meal per diem rates vary from city to city and can be viewed online at:
5. <http://policy.fso.arizona.edu/fsm/1400/1471>. No meal receipts are required for reimbursement. Any meals included in conference registration must be deducted before reimbursement calculations.
6. **Use of Personal Vehicle.** Driving a personal vehicle for field work or to local conferences is allowed. Personal auto insurance must be in place. Mileage is reimbursed at 44.5 cents per mile. Odometer log sheets must be turned in (field work only) and attached with reimbursement paperwork after travel.
7. **UA Motor Pool or Other Rental Vehicle.** Vehicles can be reserved at the UA Motor Pool, just south of campus. Prior to making a reservation online, the driver must be added to the system, which Teresa can help with. The reservation can be made online at: http://www.fm.arizona.edu/forms/MotorPool/VRS/available_vehicles.cfm. A form is created that must have several signatures. Once the signatures are obtained, the form is faxed to the Motor Pool to complete the reservation. Please plan ahead several days to reserve a vehicle.
8. **Local Conferences:** No Travel Authorization is required for conferences in the city of Tucson. Employees traveling without an overnight stay will no longer be reimbursed for meals.
9. **Business Trip with Personal Time.** Combining a business trip with personal time requires a bit more documentation and explanation, so making a note of this on the Travel Planning form is important.

AFTER THE TRIP/REIMBURSEMENT

1. **Turn in Receipts.** See one of us as soon as you can after you return from your trip. If you want reimbursement, please provide me with all original receipts, except meal receipts. Your signature is required on the Travel Expense Report form. Reimbursements are usually issued in 2-3 weeks.
2. **Personal Items/Alcohol.** No alcohol can be reimbursed. Personal items on lodging invoice will be deducted.
3. **Time Limitation:** The University is permitted to reimburse employees for business related expenses as a qualified tax-free payment under the "Accountable Plan" rules defined by the Internal Revenue Service (IRS) (Treas. Reg. §1.62-2). Those rules limit the qualified reimbursement to 60 days after the expense is paid or incurred. However, the university has unique circumstances and sufficient justification to have an additional 30 days added to the reasonable period. After 90 days, the reimbursement becomes unqualified and taxable. Unqualified reimbursements will be paid through the Accounts Payable system and reflected in the employee's wages through UAccess payroll system.

Receipts

Travel Authorization: _____

Traveler: _____

Trip Dates: _____

Trip Destination: _____

Per Diem allowed: _____

Travel Tips

All expenses except Per Diem for meals must have original receipts.

A valid receipt will have:

- An itemized list of what was purchased,
- The amount of the purchase,
- The date(s) of the purchase,
- The name of the vendor and
- The business purpose of the purchase.

A credit card slip is not a valid receipt by itself.

Phone calls on hotel bill must be business calls and justified.

Tips for food service and room service are not reimbursable if you are claiming per diem as they are part of the “incidental” on “meals and incidentals”.

If a meal is included in the conference registration you may not claim Per Diem for that meal.

Get baggage handling and taxi receipts.

Any expenses on personal time are not reimbursable. Personal time must be approved in advance.

Car Rental must be justified and authorized in advance.