

Travel 101
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TRAVEL APPROVAL REQUEST (TAR)

The university is your official insurer for your university-related trips. In order for them to be aware that you are traveling, I must complete a TAR. I have a paper version available in my office or simply supply me with the following by email:

The FRS account # you'll be using (see next paragraph if you're a student or post-doc)

Name

Address

Social security number (use paper version if you prefer this info not appear in email. If you've traveled through the center before, I have it on file)

Departure and destination airports

US Carrier if foreign travel

Start and end dates

Name of meeting/conference

The purpose of the trip (Default: "To make a presentation" unless otherwise stated)

Conference fees and meals covered by those fees, if any (i.e., breakfast included)

Estimated costs of hotel, airfare and other expenses

If you will be renting a car

If you are a student or post-doc and your sponsor is reimbursing you, please ask your sponsor to email you and cc me with the approval and the account they want to use to reimburse you.

MAKING YOUR ARRANGEMENTS

If you are staying overnight you must make your own hotel reservations and give me the receipt on your return. If you are sharing a room with a colleague, and if both are paying, please ask the hotel cashier to split the bill and give each of you a separate receipt.

When making your own flight arrangements, please remember to keep your flight info, if paying by credit card online, print out a hard copy of the itinerary to submit along with your other receipts when you complete your trip. The printout should have your name and at least some part of your credit card number on it and a zero balance indicating that it is paid.

IF YOU ARE MAKING YOUR OWN INTERNATIONAL FLIGHT ARRANGEMENTS YOU MUST START AND END YOUR FLIGHT WITH A U.S. CARRIER OR YOU CAN NOT BE REIMBURSED.

If you would prefer me to make the arrangements for you using the University travel center, please give me 2 flight preferences, including the airlines, flight numbers and departure times. I will need to give our travel agent your name as it appears on your photo ID and your date of birth.

RECEIPTS

The most important thing to remember about any trip is **SAVE EVERY RECEIPT!!!**

You DO need receipts for:

- Airline receipts and BOARDING PASSES – if you fly on an airline that does not use boarding passes, save every piece of paper related to the flight that you can. If you use an e-ticket, bring in your printed passes.
- Lodging fees -- request a receipt from a hotel, even if you paid in advance on the Web
- Train fares
- Cab fares
- Car rentals
- Conference fees
- Parking fees
- Meals that go over the daily allotment (called the per diem)

You DON'T need receipts for:

Per diem meals of \$42/day. If you go over \$42/day total, you will only be reimbursed \$42. If your travel is international, you'll be reimbursed at the US State department per diem for that location. If you attend a conference in which you receive some or all of your meals as part of the conference fee, please let me know which meals are covered.

For the following items, please keep a log of your activity (dates it occurred, etc.) to get reimbursed:

Bus, metro fares

Parking meters

Tips (if not on a receipt)

WHEN IN DOUBT GET A RECEIPT – as some of you know, it's a lot easier to get reimbursed with one than without.

I recommend that you keep receipts together in a folder or envelope; which makes individual receipts harder to lose.

When you return from your trip, turn your receipts in to me. If you had trouble obtaining a necessary receipt, please let me know immediately; I *might* be able to work something out.

Some things to note:

NON-REIMBURSABLE HOTEL FEES

You will not be reimbursed for movie rentals, room service, alcoholic beverages or any non-business related activities or items which I can't/don't want to think about.

CAR RENTAL & VAN USAGE

Please let me know if you need to rent a car as the university maintains an account with several companies. Car rental insurance is covered by the university so DO NOT PAY FOR RENTAL CAR INSURANCE.

Also, the university maintains a fleet of cars and vans to use for business travel.

HOSTING

If you have permission from the director or sponsor to HOST a meal (for example, you pick up the tab for a brainstorming lunch with colleagues from the center or your meeting), save the receipt *and* on a separate sheet of paper list the names of the attendees, their affiliations and the purpose of the meeting.

CURRENCY CONVERSION

If your travel is international, you do not have to convert your receipts to dollars as I will do that for you. I use OANDA CURRENCY CONVERTER. If you prefer, you can hand in your credit card statement, since it accurately reflects what was actually charged to your account. Please understand that waiting for the statement may delay your reimbursement.

TRAVEL EXPENSE STATEMENT (TES)

Once you turn in your receipts to me, I enter them into the travel system. The system prints out a form for your signature which lists your reimbursement claims. By signing the form you are stating that you agree with the amount listed to be reimbursed to you. Once signed-off, I turn it in to the Business Office at AVW and you are on your way to getting your reimbursement.

If you have any questions about this information, please feel free to contact me.

May your travels be safe and productive.