

Travel

Presenter: Tanya Barela

Department: Business Office



BE BOLD. Shape the Future.

NMSU - Grants

TRAVEL PROCEDURES are constantly being updated. This Travel PowerPoint was updated on 08/07/2023. If procedures have changed the most current policies will be used when calculating your Travel Paperwork.

What's First?

- Before making Travel plans:
 - Obtain Department Approval
 - Complete Proper Paperwork
 - **Travel Pre-Authorization Form**
 - To find Travel forms, Go to NMSU G homepage
 - Departments
 - Business Office
 - Business Forms (top of page centered Crimson colored button)
(open in **Firefox** to sign form with Digital Signature)

Pre-Authorization Form



Travel Pre-Authorization

(This form is required to be filled out & approved **PRIOR** to traveling)

Please Check:

In-State Out-of-State
(Requires Level 2 Approval)

Per Diem Actuals Mileage
(No Receipts Required) (Receipts Required)

REQUESTING TRAVEL ADVANCE? (Limited to 3 per Fiscal Year. Travel Advance Form due 4 weeks prior to departure date)

Requestor: _____ Official Title: _____

Banner ID#: _____ (800*****) Dept Index: _____ (500***)

Purpose of Trip (State title of Conference/Workshop-ie. Attending: ASBDC Annual Conference, RCCA Annual Conference, etc)

Destination: _____ (City and State)

Departure Date & Time: _____ am/ _____ pm Return Date & Time: _____ am/ _____ pm

ESTIMATED COST OF TRIP

Registration: (You are required to complete a Purchase Requisition if NMSU is to pay for fees) \$ _____

Will be paid by Requester-Reimbursement Required To be paid by NMSU

Per Diem: _____ days at \$ _____ p/day & _____ days at \$ _____ p/day (For meals/lodging if not requesting actuals) \$ _____

Lodging: _____ (Attach Quote-Lodging must be paid by traveler) \$ _____

Hotel Phone # _____ **Cell Phone #** _____

A



Vehicle Requests

- You must have a Vehicle Driving Permit to drive an NMSU vehicle.
- Enter your vehicle request in School Dude:
 - Dates you will need the vehicle
 - Time vehicle will be needed and time of return
 - Your destination
 - Number of people
 - What the vehicle will be used for

Claiming Per Diem

- You will receive a set amount of reimbursement per day for lodging and meals.
- The rate depends on the area you are traveling to.
- For current rates you can go to <https://travel/nmsu.edu> or email Tanya @ tanyab@nmsu.edu
- Receipts are not required when claiming per diem.

Claiming Actuals

- Receipts are required.
- Reimbursement will be based on the actual amount of the receipt submitted.
- Mainly used for hotel. (receipt you turn in must show a zero balance or paid in full)(You have to ask the front desk for a copy of the receipt with a 0 balance. The receipt they put under the door **will not** work.)

Claiming Actuals (Lodging)

- The applicable lodging per diem at the destination.
- The actual cost will be reimbursed for lodging at an official conference or meeting hotel.
- The actual cost of lodging where the University has negotiated an employee rate.
- The actual cost with justification and appropriate approval.

Requesting Mileage

- If you are traveling in-state or out of state and will be using your own vehicle and requesting reimbursement for mileage, you must get approval via email (using a **Mileage Request Form**) from Department Supervisor and VPAA/ Associate Director.
- A **Mileage Request Form** is required.
 - NMSU G homepage- Faculty & Staff- Staff tab- Business Office- Business Forms
 - <https://grants.nmsu.edu/business-office/forms/>

Mileage Request Form



NMSU Grants

Personal Vehicle Reimbursement Request

Personal Vehicle

Rate: 0.655 per mile

School Vehicle

Rate: Car: 0.61 per mile

Other: 0.50 per mile

This form is used when requesting to use your personal vehicle and you wish to request/claim mileage.
Please fill out this form completely before your scheduled trip.

Requester Name

Name

On

I will be going to

Dates

Destination

to attend

Conference / Training / Workshop etc.

B



Approved Pre-Authorization

- Return **signed** Travel Pre-Authorization to Tanya.
- Quotes and Agendas must be attached.
- Mileage Request Form: approval email to use personal vehicle.

Making Travel Arrangements

- NMSU Credit Card is available for Airfare and Conference Registration Fee ONLY!
- Hotel must be paid by the Traveler and will be reimbursed upon return of trip (Per approved Rates).
- Shuttle & Baggage/Parking Fees must be paid by the Traveler and reimbursed upon return of the trip.
- Traveler is responsible for making their own reservations.

Lodging (Actuals)

5C.30.40 Reimbursement of Actual Meals and Lodging Expenses

The following provides the requirements to be eligible for reimbursement of actual expenses for meals and lodging:

- Reimbursement of actual expense for meals – Amounts claimed cannot exceed the amount allowed under the per diem rules. If the city destination is not listed, the employee must use the current standard meal reimbursement per diem. When actual meal costs are less than the destination per diem meal rate, meal receipts are not required.

Reimbursement of actual expense for lodging – Original and externally produced receipts are required. Travel reimbursement for lodging is limited to (1) the applicable lodging per diem at the destination, (2) the actual cost will be reimbursed for lodging at an official conference or meeting hotel, (3) the actual cost of lodging where the University has negotiated an employee rate, or (4) the actual cost with justification and Appropriate Approval. Additional costs incurred for dates before or after the dates of the business event, or for other individuals not on NMSU business are not allowed.

List of approved Hotels

- Listing of New Mexico Hotels is available. If you would like a list please email or call Tanya in the Business Office.
- Office Phone: 505-287-6682
- Email: tanyab@nmsu.edu

After Trip

- Complete the Travel Reimbursement Form.
 - NMSU G homepage- Faculty & Staff- Staff- Business Office- Business Forms
- Please do not leave any blanks
- Attach Agendas, Receipts, MapQuest
- Receipts are NOT needed if claiming Per Diem
- Meals: State how many meals were provided by the conference. **You must still claim the meal if it was provided, even if you did NOT attend.**

Travel Reimbursement Form

No staples please!



BUSINESS OFFICE TRAVEL REIMBURSEMENT REQUEST (*This form is to be submitted AFTER trip has been taken)

Date: _____

Mark One: In-State Travel Out-of-State Travel

Mark All that Apply: Per Diem Actuals (Lodging) Mileage Airfare
(No Receipts Required) (Receipts Required) (Personal Vehicle/Approval Req) (Itinerary & Travel Req Required)

Requestor: _____ Banner ID#: _____
(Staff Member ID# 800*****)
Official Title: _____ Dept Index# _____
(Department Account to be billed: 500***)

Destination From: _____ To: _____
Date Left: _____ Time: _____ Date Return: _____ Time: _____

Purpose of Trip (State title, i.e. Retention workshop, NMSU-Alamogordo Fall Round-up, NM Higher Education Task meeting, etc)

C



Meals & Lodging

- For the first and last day of travel, meal per diem is limited to 75% of the destination meal per diem.
- Lodging may be reimbursed using per diem rates for lodging plus applicable taxes or at actual cost for conference or meeting hotels, at hotels with established NMSU rates, or with dean/VP/VPAA/Associate Director approval.
- Departments may limit reimbursement to less than the amount allowed by the University.

Required Documentation

- Conference Fees: Registration form, agenda, and receipt.
- Hotel receipts: Showing zero balance, including parking if applicable. At the time of purchase, be sure to print receipt from online booking services such as Expedia or Orbitz.
- Car rental: Final itemized bill.
- Airfare: Provide receipt including itinerary and form of payment.
- As applicable, receipts for airfare, parking, shuttle, taxi, or fuel.

Claiming Per Diem for same day travel

- You **will not** be able to claim Per Diem for Same Day trips that are made between your normal working hours.
- You can claim Per Diem if your travel lasts 9+ hours.
- Employees must travel at least 50 miles from their primary official place of work.

Contact Information

If you have any questions regarding travel please contact:

Tanya Barela, Business Office

505-287-6682

tanyab@nmsu.edu

or

Alice Salcido, Business Office

505-287-6630

asalcid@nmsu.edu