

**TRAVEL WORKBOOK FOR EDUCATIONAL PSYCHOLOGY FACULTY, STAFF & STUDENTS**

As a university traveler, it is your responsibility to know and follow all “Traveler” policies. Policies relative to the traveler’s responsibility can be viewed at: <https://nau.edu/university-policy-library/travel-policies/> (TRV-510-04 Traveler).

***Link to Travel Forms:*** [***https://nau.edu/ed-psych/forms-checklists-manuals/***](https://nau.edu/ed-psych/forms-checklists-manuals/)

***(General forms for all EPS Programs/Travel related documentation section)***

**Travel Policy changes happen often, and can affect your travel plans. This travel workbook has been created to help the travel process be less confusing – ultimately it is your responsibity to follow the above mentioned “Traveler” policies**

**If any of the support documentation relative to your trip is only available electronically/ via website or phone app, it is the traveler’s responsibility to print a copy of the electronic information or submit a pdf of the information. The department Travel Processor will not print this information for you**

Arizona State lodging and per diem allowable amounts are located at: <https://nau.edu/comptroller/travel-welcome/>

**RECENT TRAVEL POLICY CHANGES: Information to keep in mind:**

* (Feb 2020 revision) TYPED or CUT-N-PASTE versions of a signature on documentation is **not allowed;** You are allowed to sign travel documentation, and scan/email, or fax the documentation in the submission process
* A Travel Funding Request must be approved prior to the start of travel, and before any university funds being utilized towards travel expenses. Please know that there can be additional processes required prior to funding approval; i.e., fly vs. drive comparison, alternative lodging vs. conference hotel, etc.
* If the traveler makes travel arrangement using personal funds, such expenses will not be reimbursed until after travel has concluded. Please work with your department travel processor to use a university Pcard for travel arrangements whenever possible
* All pre-travel instructions must be followed/completed **before** the start of your planned travel, or reimbursement will not be processed regardless of the funding source; i.e., COE funding, EPS funding, GSG funding, etc.

***Pre-Travel Instructions***

1. To be reimbursed for any vehicle related expenses; i.e., mileage or fuel (one or the other), parking expense, etc., or drive a university vehicle, you must be a university authorized driver. Please refer to this link: <https://nau.edu/Facility-Services/Safety-Training/> (Authorized Driver Program)
   1. After completing the Defensive Driving Module in BbLearn, please send a screenshot of the completion page of the module to Hope DeMello for office records ([Hope.DeMello@nau.edu](mailto:Hope.DeMello@nau.edu))
2. Complete an electronic Annual Travel Certification Form.

<https://in.nau.edu/comptroller/travel-forms/>. List Dr. Horn as your supervisor.

1. Send an email to the EPS Department Chair ([Robert.Horn@nau.edu](mailto:Robert.Horn@nau.edu)) noting the following information (serves as an electronic Record of Absence/Public Purpose):

* Traveler’s name
* Traveler’s NAU ID number
* Dates of travel
* Purpose/Reason for Travel
* Destination
* How does this travel benefit the following:
  + Your Professional Development
  + EPS Department
  + EPS Department Programs
  + College of Education
  + Northern Arizona University
* Are accommodations for teaching are necessary. If so, how will your classes be covered (n/a for students)
* Any expense applied to: Prof Dev, Course Fee Acct, Program Fee Acct or is university Pcard to be used for any expense?
* Comments:

The EPS Department Chair can only approve electronic ROAs after an Annual Travel Certification Form has been electronically submitted/approved. The EPS Department Chair will respond to your email reflecting approval or denial

1. Complete an EPS Travel Funding Request form:

* Please complete this form in detail. List all known funding sources, and your projected travel cost. Submit the signed form to [Hope.DeMello@nau.edu](mailto:Hope.DeMello@nau.edu) in the Educational Psychology Department for further processing/approvals
  + Attach all required support documents (see Required Support Documentation section of form):
    - If a document is only available electronically/via website or phone app, it is the traveler’s responsibility to submit a pdf, or print a copy of the webpage(s), and attach to the funding request. The department Travel Processor will not print the document(s)
  + This form must be **approved** by the Department Chair before the start of your travel, and before university funds can be utilized towards travel expenses
* (February 2020 revision) Typed or cut-n-paste versions of a signature on documentation is not allowed; You are allowed to sign travel documentation, and scan/email, or fax the documentation in the submission process
* **Driving Out-of-State to Your Destination:**
* To be eligible to claim out-of-state mileage reimbursement (or any vehicle related expense), COE requires the traveler to submit a driving vs. airfare comparison and rationale **prior** to the start of travel for exception approval. In the rationale, please list any additional lodging, meal, or miscellaneous expenses that may be incurred if you drive to the destination. Forward this comparison and rationale to Hope.DeMello@nau.edu. The EPS Department will forward the comparison to COE Accounting for exception consideration/approval
* **If using a travel website (Expedia, Travelocity, etc.) to arrange discounted package deals; i.e., airfare and lodging booked together:**
* The traveler must provide documentation that reflects the discounted price of each travel expense that has been combined into one price. For example -- the discounted price for booking your airfare and lodging together is $400; what was the amount of this total used towards airfare, and what was the amount of this total used towards lodging. This documentation is required to substantiate that the expenses conform to set rates established in NAU’s travel policy. If you used a travel website to book your lodging -- To be eligible for lodging expense reimbursement, you must also secure a receipt reflecting a $0 balance from the lodging establishment, regardless of what travel website you utilized to pay for this lodging
* **If staying at an alternative lodging rental; i.e., AirBnB,VRBO, Turnkey, etc.:**
* To be eligible for alternative lodging rental reimbursement, you must complete a conference hotel expense vs. alternative lodging rental expense comparison for exception approval, along with a written rationale why you are choosing to stay at an alternative lodging rental location **prior** to the start of travel. The rationale must list individuals who will be staying at this location, and contributing towards the expense of the alternative lodging (list what the amount of each person’s total expense contribution will be). Also, note any extra expenses that would be accumulated if you stayed in alternative lodging; i.e., ground transportation to/from alternative lodging, extra fees associate with the expense, extra meal expense (all information should come in one email, along with support documentation for both expenses). Submit the documentation to [Hope.DeMello@nau.edu](mailto:Hope.DeMello@nau.edu), and she will submit the documentation to the NAU/COE Policy Exception person

***Post-Travel Instructions***

***All claims/documentation must be submitted to your department travel processor, Hope.DeMello@nau.edu, within five (5) business days of the completion of travel***.

1. **Submit a Travel Expense Summary (must use 1-8-2020 version or later per COE Accounting):**

* Please complete this form in detail. There are only two locations from which travel can start and end – your residential address or your duty post/campus
* You must include departure date/time and arrival date/time for each destination.
* Every segment of travel must have a dedicated line on the summary – even if multiple segments of travel take place on the same date; i.e., home to Phoenix Sky Harbor, Phoenix Sky Harbor to Denver International Airport, Denver International Airport to Denver Hyatt Regency, etc.
  + Please keep in mind that if your conference travel airfare includes multiple flights, you are required to list each flight; i.e., home to Phoenix Sky Harbor, Phoenix Sky Harbor to San Francisco International Airport, San Francisco International Airport to Seattle/Tacoma International Airport, Seattle/Tacoma International Airport to Seattle Marriott, etc.
* Each day the traveler is in travel status must be illustrated by at least one entry, even if the entry only includes the date and name of the conference/meeting
  + (Recent change) The university now required you to reflect how you traveled to and from the conference/event on a daily basis. (Recent change) Also, if you left the conference/event site for any reason during the daily conference schedule, you must reflect these segments of travel as well; i.e., left conference site to have lunch at a restaurant, went to copy center to have photocopies made, etc.
* Mileage -- enter odometer readings (or a MapQuest printout reflecting the estimated mileage of the trip) if you used your own vehicle for in-state or out-of-state travel. Vehicle related expense; i.e., mileage, parking fees, etc., are only reimbursable if you are registered as an university authorized driver
  + If travel is not initiated from your duty post or campus, commute miles will be deducted
* Meals (if claiming reimbursement) – COE required that you **MUST** submit **an itemized receipt** for each meal in which you are claiming reimbursement, and will only be reimbursed up to the single day rate, or state allowable rate for your destination location depending on the circumstances
  + **DO NOT** tip over 20% on the pre-tax meal amount
  + To be reimbursed for meals, you must have traveled outside of a 50 mile radius from your duty post or campus, and be in travel status for at least six-hours.
* (February 2020 revision) Typed or cut-n-paste versions of a signature on documentation is not allowed; You are allowed to sign travel documentation, and scan/email, or fax the documentation in the submission process

1. **Attach receipts for the following, if requesting reimbursement:**

* Conference Registration:
  + You will need to provide a receipt for conference registration expense
  + You will need to submit an original conference book **and** nametag from the conference as proof of attendance (the book can be returned after photocopies of specific pages are made)
    - * If book is electronic or contained within a phone app, it is your responsibility as the traveler to print the conference book or provide a pdf of the book -- please keep in mind the link to the conference book will expire, as well as the phone app.
* Meals/Per Diem:
  + You will need to provide an **itemized receipt** and proof of payment for each meal you are requesting reimbursement. **Alcohol consumed at a meal is not a reimbursable expense, and will be removed from the meal receipt total** (as well as tax associated with the expense)
  + (Recent change) You will only be reimbursed for a gratuity/tip that is equal to or less than 20% of the pre-taxed amount.
* Transportation:
  + Airfare: You must turn in original receipts and an original airline itinerary
  + Ground Transportation: You must turn in original receipts for taxi, shuttle, bus, Uber, Lyft, train travel, or any rideshare situation
* Lodging:
  + You must turn in an original itemized hotel receipt reflecting a zero balance. You will be reimbursed up to the maximum allowable state rate, unless you are staying at a designated conference hotel. If you stay at a conference hotel, you can be reimbursed at the conference hotel rate, but you must provide documentation of the conference hotel and rate
  + If sharing lodging with another person, the receipt for your portion of the payment for the lodging **must** list your name on the receipt.
  + **PLEASE REMEMBER:** If you utilized a travel website to book your lodging, to be eligible for lodging expense reimbursement, you must get a receipt reflecting a $0 balance from the lodging establishment
  + **PLEASE REMEMBER:** If staying at an alternative lodging option, to be eligible for lodging expense reimbursement, you must have the conference hotel vs. alternative lodging comparison approved prior to the start of travel.

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