

## Travel Overview: A Guide for Student Groups

1. See the Travel Liaison prior to any and all travel.
2. Designate one student in the group to be responsible for handling the entire reimbursement. This student will complete all forms and handle money/funds on behalf of the group.
3. The designated student should fill out the Political Science Student Travel Application, Academic Institutional Excuse form, Traveler Certification Form, provide a list of all students' names & ID #'s who will be traveling, and follow the Student Group Pre-Travel Checklist in order to ensure accuracy. Forms are available on the website under the Internal Use link. For the most up-to-date forms, see the Travel Liaison prior to completion of forms.
4. The Application form is designed to be a departmental application for funding and to also document projected expenses and other funding sources. All important fields and information to be provided have been put in bold font. Please fill in the form carefully and be as thorough as possible. In addition, you may want to create a separate budget sheet to be used when applying for funding from other departments/offices. See organization/group records or department travel records for examples.
5. Complete the **Academic Institutional Excuse Form** listing all traveling students' names alphabetically. Only one form is required for the entire group, and it needs to be signed by the group's faculty advisor, the department chair, and the Associate Dean **at least 5 days prior** to travel. If it is less, then the Associate Dean will not give authorization. Copies of the form should be given to those professors whose classes students will be missing.
6. The designated student must complete the **Traveler Annual Certification form**, which is required as proof that he/she understands travel policies; it covers all travel within a calendar year (January – December). **Travel will not be processed without this and the above forms, and they must be turned in PRIOR to travel.**
7. The Pre-Travel Checklist is designed to help you complete and turn in all required forms, receipts and documentation. Please consult it **before** you turn anything in to the Travel Liaison. (Any missing documentation causes delays in reimbursement.)
8. Funding from Other Sources: Students may apply for funding from other campus offices. One student should submit an application on behalf of the group just as he/she does for the department. Student Groups commonly receive funding from the SBS Dean and the Vice President for Research (VPR), and links to those applications are found on the department website. All travel is processed through one office, so even if you do not receive funding from Political Science, we still process your travel since that is your departmental affiliation. Be sure that the Travel Liaison knows where else you have applied for funds and receives copies of applications or award letters showing the amount funded **PRIOR** to travel. The exception is with ASNAU funding - they handle reimbursement separately, however the Liaison still needs to know if you're expecting funds from them. **[Please note that the department funds the entire group, usually by allocating a sum to be used as needed during the academic year, whereas the SBS Dean and the Vice Provost commit funding per student per semester.]**
9. Personal Vehicle: Provide the **driver's license number** and **license plate number** for each student driver. If driving out-of-state, justification is required (i.e. airfare vs. mileage). Only the

car owner will be reimbursed for gas even if other students share the driving, so only the driver should pay and submit receipts for gas. Original gas receipts are required, but only those dated within the travel period will be reimbursable (i.e., for those who like to fill up before leaving and/or upon returning, be sure it's on the day travel begins and/or ends). If funding is sufficient, then it may be possible to reimburse drivers for mileage instead of receipts. (Number of miles multiplied by 44.5 cents.) When reimbursing mileage, provide a Mapquest print out showing the exact distance between NAU and the travel destination.

10. Conference Registration & Program: **Prior** to the trip, you must provide documentation that the registration forms/fees were submitted/paid and showing what was paid for (registration fee per student, institution registration fee, meals provided at conference, additional fees, etc). You must also provide a copy of the invitation to attend (letter or e-mail), if applicable, and/or any preliminary conference information. **After** the trip you will need to provide a copy of the program, *if not submitted ahead of time*, showing the daily schedule, your participation, meals included, etc.
11. Hotel/Lodging: An itemized receipt is required showing a zero balance (i.e. the bill was paid), showing the hotel name, address, and phone number, all expenses, the rate for each night (group rate and number of people per room), and the check in/out dates & times. You will NOT be reimbursed for personal expenses, (i.e. hotel gift shop, personal calls or services, etc.). Again, the cost must be in the best interest of the University. Acceptable rates can be found at [www4.nau.edu/comptr/docs/SAAM-2d06-20041216.pdf](http://www4.nau.edu/comptr/docs/SAAM-2d06-20041216.pdf). [NOTE: If the hotel rate exceeds the acceptable rate, justification must be provided. However, if it is the conference hotel provide documentation showing that you received the conference room rate.]
12. All receipts need to be taped to 8 ½ x 11 pieces of paper. To save paper you may use both sides. Please try to group receipts accordingly, i.e. keep gas receipts, public transportation receipts, or food receipts together. If receipts are lost, you will not be reimbursed. (If the total comes to less than \$25 one way for taxi or shuttle, then the original receipt is NOT required, but you should provide some record of the expense for reimbursement purposes.)
13. Once travel is complete, the designated student will be required to sign a J Form (Exhibit J) generated by the Travel Liaison, which shows the breakdown of expenses and the total amount to be reimbursed. Please review it carefully, along with all supporting documentation, before you sign. It is your written consent that everything has been done according to policy. **This form is required in order for your reimbursement to occur.** (No J Form = no check.) Signing this also gives NAU the right to request reimbursement from you should the amount you receive exceed what you are actually entitled to. **In addition to the J Form**, the Travel Liaison will complete a Spreadsheet showing the breakdown of costs and funding per student to be signed by the faculty advisor, designated student, and possibly the organization/group's President or Vice President, if necessary.

If you have any questions or need help completing any forms, please see the Travel Liaison in the Political Science department. She will work with you to ensure that everything is done correctly and according to Department and University policies.

Travel Liaison: **Kara Stone – SBS Rm. 224, Phone: 523-6948, Email: [Kara.Stone@nau.edu](mailto:Kara.Stone@nau.edu)**

**Additional Travel Info for Less Common Group Travel Needs:**

*If your travel will involve any of the following circumstances, work closely with the Travel Liaison so that policies are followed and understood.*

- **Airfare:** Generally student groups drive since it is cost effective, however if it is more economical to travel via plane, then the tickets should be booked **at least 3 weeks ahead** of time and students will need to provide **at least 2 different sources of comparison**. (Ex: Any airline's website, Expedia, Travelocity, Cheap Tickets, Hotwire, Orbitz, etc.) NAU wants evidence that you made an effort to be economical. It is not necessary to choose the cheapest fare if it involves excessive stops or layovers or travel at redeye times. Just try to keep it in the University's best interest. **Please note that flying out of Flagstaff does not require justification.** If you plan to fly out of Phoenix and are claiming mileage, then you have to provide justification, including a comparison of the airfare roundtrip from Flagstaff to Phoenix and the mileage roundtrip from Flagstaff to Phoenix and any meals that would be claimed. In the event that the flight out of Phoenix is scheduled at a time when a flight out of Flagstaff is not possible, please note this with your airfare documentation; this will serve as the justification for not flying out of Flagstaff.
- **Food:** Student groups typically have limited funding and therefore food is not often reimbursed. However, if there is sufficient funding, then either complete the Meal Money form or each student must provide receipts for all meals purchased. You must provide the dates and times when travel begins (left at 7:00 am) and when travel ends (arrived in Flagstaff at 5:00 pm) in order to determine what meals students are entitled to. In addition, meals provided by a conference should be documented. [NOTE: You will not receive reimbursement for more than 3 meals in a given day and under no circumstances will alcoholic beverages be reimbursed.] If receipts are lost or unavailable, then you will be reimbursed based on per diem, if funding permits.
- In the event of **Foreign Travel**, exchange rates must be provided for all receipts not already converted to US dollars. You must use the conversion rates in place for the dates of travel. ([www.oanda.com](http://www.oanda.com) and [www.x-rates.com](http://www.x-rates.com) are two online currency exchange sources with historic calculation.) Please note that travel to Hawaii and Alaska is considered foreign.

NOTE: Travel to sanctioned countries requires that HR be notified for insurance purposes; the traveler and/or the Travel Specialist **MUST** contact Kay Scarborough in HR in the event of travel to a sanctioned country.

**For your convenience and safety, please consult the following sites when traveling internationally:**

*list of sanctioned countries:* [www.treasury.gov/offices/enforcement/ofac/programs/](http://www.treasury.gov/offices/enforcement/ofac/programs/)  
[www.azrisk.state.az.us/Forms/ForeignStudentsADDFactSheet.pdf](http://www.azrisk.state.az.us/Forms/ForeignStudentsADDFactSheet.pdf)  
[www.azrisk.state.az.us/Forms/InternationalInsuranceProgramOverview\\_3.pdf](http://www.azrisk.state.az.us/Forms/InternationalInsuranceProgramOverview_3.pdf)  
[www.azrisk.state.az.us/Forms/MexicoAutoAccidentGeneralInformationDon.pdf](http://www.azrisk.state.az.us/Forms/MexicoAutoAccidentGeneralInformationDon.pdf)  
[www.azrisk.state.az.us/Forms/MexicoClaimReportingRequirementsKurt.pdf](http://www.azrisk.state.az.us/Forms/MexicoClaimReportingRequirementsKurt.pdf)  
[www.azrisk.state.az.us/Forms/ACE%20Exec%20ASST.pdf](http://www.azrisk.state.az.us/Forms/ACE%20Exec%20ASST.pdf)  
[http://travel.state.gov/travel/cis\\_pa\\_tw/cis\\_pa\\_tw\\_1168.html](http://travel.state.gov/travel/cis_pa_tw/cis_pa_tw_1168.html)