

## Travel Overview: A Guide for Students

1. See the Travel Liaison prior to any and all travel.
2. Fill out the Politics & International Affairs Student Travel Application, Academic Institutional Excuse form, Record of Absence, Traveler Certification Form, and follow the Student Pre-Travel Checklist in order to ensure accuracy. Forms are available on the website under the Internal Use link.
3. The Application form is designed to be a departmental application for funding and to also help you document your 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.
4. If you will be missing classes, you must complete the **Academic Institutional Excuse Form**. It needs to be signed by your advisor or the faculty member authorizing the travel, the department chair, and the Associate Dean **at least 5 days prior** to your travel. If it is less, then the Associate Dean will not give authorization. You need to give copies of the form to those professors whose classes you will be missing.
5. You must also fill out a **Record of Absence form** if you are a GA or employed by NAU and receiving NAU insurance benefits. The ROA is for insurance and liability purposes.
6. The **Traveler Annual Certification form** is required as proof that you understand travel policies, and it covers all travel in a calendar year. **NOTE:** Travel will not be processed without this, the checklist, and the above 2 forms, and all 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 complete it **before** you turn anything in to the Travel Liaison, and submit it with your documentation. (Any missing documentation causes delays in processing and/or reimbursement.)
8. Funding from Other Sources: Students may apply for funding from other campus offices. Students 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 Politics & International Affairs, 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. The exception is with ASNAU & GSO funding - they handle reimbursement separately, however the Travel Liaison needs to know what they are funding so that you are not reimbursed for the same expense twice.
9. Airfare Quotes: You will need to provide business comparison quotes from 2 different sources, (Ex: any airline's website, Expedia, Travelocity, Cheap Tickets, Sidestep, Hotwire, etc.), which should be dated at least 3 weeks prior to the travel. Both comparisons should be leaving from/arriving at the same destinations and should be for the same dates/times. Business comparison means that your quotes are for your university business travel dates/times. This distinction of "business" is particularly important if you will be adding any personal time to your travel. In the instance that you are planning to do additional travel that would be considered personal time, you will need to submit the 2 quotes for the portion of the trip that is specifically for university business, and then you will also submit your actual airfare receipt (no additional quotes required). If the airfare costs more than your business travel would have, then you will be reimbursed for the lowest business quote. If it is less, then you can be reimbursed the full amount. Remember, when using university funds, you must show that you are acting in the university's best interest.
10. Airfare Documentation: 2 business comparisons/quotes, your actual receipt and itinerary (this can be one of your comparisons if applicable), and boarding passes (N/A if ticketless or e-ticket).
11. Airfare from Flagstaff vs. Phoenix: Flying out of Flagstaff is acceptable to the university and need not be justified. 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 vs. the mileage roundtrip from Flagstaff

to Phoenix and any meals and parking costs that would be claimed. In the event that the main 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, and you will not need to provide the cost comparison. *Otherwise, if you fly out of Phoenix for personal convenience, but do not wish to submit the necessary justification, then do not claim mileage, additional meals, or airport parking.*

12. Personal Vehicle: You must provide your **driver's license number** and the addresses departed/arrived. If you drive with someone, only one person will be reimbursed. Gas receipts are not necessary as reimbursement is figured in mileage. (Number of miles multiplied by 44.5 cents). You may either provide a **Mapquest print-out** showing the exact distance between NAU and your travel destination to figure mileage (deduct commute miles if you do not travel roundtrip from NAU), or you must provide **odometer readings and every exact address departed/arrived for the entire trip**. However, due to the fact that students tend to receive a limited amount of funding, you may choose to be reimbursed by gas receipts.
13. Out-of-state Driving: If you want to drive your car out-of-state, then **justification is required**. This means, in addition to the required documentation as explained above, you must provide 2 business airfare comparisons vs. mileage info, factoring in meals, parking, and other expenses you would incur driving vs. flying, (i.e. flight to LA is one hour whereas driving is 6-8 hours, which means more meals, hotel parking, and potentially an additional overnight stay). **NOTE:** Driving to a location **within 100 miles of the Arizona border can be considered in-state**. (Ex: You would not need to submit justification for driving to Las Vegas, since it is within 100 miles of the border and therefore can be considered in-state; however you must use AZ default rates instead of the out-of-state Las Vegas rates. Otherwise, to use Las Vegas rates, comparisons and out-of-state justification need to be provided.)
14. Rental Vehicles require permission prior to travel, and they are **strongly discouraged**. If you have any questions, please see the Travel Liaison.
15. University Vehicles are available for use through Transportation Services. NAU would prefer that University vehicles be used instead of personal vehicles for university business purposes. Speak to the Travel Liaison if you wish to take advantage of this option as Transportation Services directly bills the department.
16. Public Transportation: (Taxi, shuttle, bus, train, etc.) Receipts are **NOT** required for bridge and road tolls, taxi, bus, streetcar, etc. unless the cost is greater than \$25 one way. If the cost is greater than \$25, the original receipts are required. For organization purposes, please provide some type of record of the “no receipt” costs – memo, email, etc. **NOTE:** If conferences have a deal on shuttles, you **MUST** take advantage of it instead of utilizing more costly alternatives.
17. 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 (meals, membership fees, etc). Only the registration fee is reimbursable. You must also provide preliminary conference information and an abstract of the paper to be presented as well as a copy of the invitation to present (letter or e-mail). **After** the trip you will need to provide a copy of the program which shows the daily schedule, meals included, your presentation slot if applicable, and all sessions attended, etc. **Please note that if there are multiple authors, only ONE person will be funded, and you will NOT receive funding to present a paper more than ONCE.**
18. Hotel/Lodging: An itemized receipt showing a zero balance is required, showing the hotel name, address and phone number, all expenses, the rate for each night (lowest single rate), 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 <http://www4.nau.edu/comptr/docs/SAAM-2d06-20061115.pdf>. If you share a room, you **MUST** get separate receipts showing the split bill. You cannot be reimbursed for the cost of 2 people. **[NOTE: If the hotel rate exceeds the acceptable rate, justification must be provided. Documentation must be provided if it is a conference hotel, showing that you received the special conference rate.]**

19. Food: You must provide itemized 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 you are entitled to. In addition, meals provided by a conference, hotel, or flight should be documented and are not reimbursable. For *in state travel*, you may only claim reimbursement for meals if an overnight stay is involved. **[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 funding is sufficient or receipts are lost or unavailable, then you will be reimbursed based on per diem rates. Discuss this option with the Travel Liaison.
20. 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. Visas and passports are not reimbursable expenses since they remain the property of the traveler.

NOTE: Travel to sanctioned countries requires that HR be notified for insurance purposes; the traveler 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/)

[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)

[www.azrisk.state.az.us/agency\\_information/insurance/default.asp#forms](http://www.azrisk.state.az.us/agency_information/insurance/default.asp#forms) - AZ Risk Management Website has links to information for Traveling Outside the USA

21. 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 all food receipts together and keep public transportation receipts together. If receipts are lost, you will not be reimbursed.
22. Advances: The university strongly discourages cash advances. The Travel Liaison WILL NOT do a cash advance. If you need to make arrangements months ahead of time, it is possible to obtain pre-travel reimbursement for airfare and registration ONLY with appropriate documentation and valid justification. **See the Travel Liaison to discuss this option.**
23. **Once travel is complete, then documentation must be turned in, along with the Post-Travel Checklist, within 5 business days of your return.** You will be **REQUIRED** to sign a **J Form** (Exhibit J) generated by the Travel Liaison, which shows the breakdown of expenses and the 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 dock your pay or request reimbursement from you should the amount you receive exceed what you are actually entitled to.
24. All university travel policies can be found online through the Comptroller's website. As a university representative in travel status, you are responsible for adhering to the policies for university business travel. See the department website for travel forms and links to university policies.

If you have any questions or need help completing any forms, please see the Travel Liaison. She will work with you to ensure that everything is done correctly and according to Department and University policies. **Kara Stone – SBS Rm. 224, Phone: 523-6948, Email: [Kara.Stone@nau.edu](mailto:Kara.Stone@nau.edu)**

Your signature below verifies that you have read through this packet and/or discussed it with the Travel Liaison. You have been notified of the university's travel policies and online policy manual. You accept responsibility for knowledge of and agreement to adhere to university travel policies.

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Signature

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Date