

Anthropology Travel Reimbursement Training



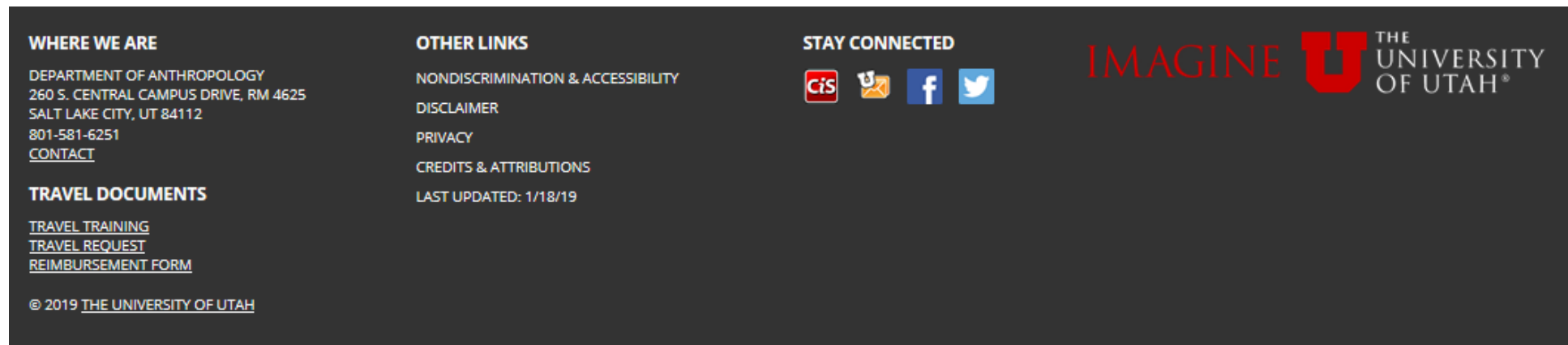
Anthropology 

UNIVERSITY OF UTAH

Updated: Spring 2019

Step 1 – Trip Registration

- Fill out all applicable sections of the Travel Request Form form.
 - This form can be found in the footer of any Anthropology website:
<https://www.anthro.utah.edu>



- Trip registered for each traveler, not a group. If traveling with multiple people please talk to the staff to make a strategy for how to cover all travel costs for group travel.

Step 2 – Prepayment Options

- Prepayments – No out-of-pocket cost
 - Itemized quote required for prepayment, paid directly by travel department
 - Hotel
 - Airfare
 - Conference Registration
- Cash Advance – No out-of-pocket cost
 - Can be used to cover nearly anything, requires VP signature. Needs to be submitted at least 2 weeks before needed, to ensure request is processed.
- Early Reimbursement – Requires out-of-pocket expense
 - Requires receipts, but can be completed before a trip occurs

Prepayment

- No out-of-pocket cost, paid directly by travel department
 - Hotel
 - Requires personal credit card number, no charges, but kept on file for incidentals
 - If there is a group discount, such as for a conference hotel, provide the anticipated amount.
 - Airfare
 - special section on this later
 - Conference Registration
 - Send a link to conference webpage that includes a price and preliminary program.
 - This can also be done if you are organizing a conference and need to reserve event space.

Cash Advance

- No out-of-pocket cost, funds given to faculty directly via check or direct deposit.
- This is the most flexible method of prepayment, you are given cash to use for any expense, KEEP RECEIPTS.
- Cash Advances take time to process, allow for at least 2-3 weeks processing time to be safe.
- Procedure: Estimate your expenses, and write a letter on department letterhead explaining the need for a cash advance.
 - Typically used for large expenses and/or extended travel.
- After the final reimbursement amount is calculated, costs above the cash advance can be reimbursed. If the reimbursement is less than the cash advance, the traveler will need to write a check to the university for the remaining amount.

Early Reimbursement

- Reimbursement of out-of-pocket expenses prior to travel.
- If you have paid for flights, hotels, car rental etc... those purchases can be reimbursed before the trip occurs, eliminating the need to have personal capital tied up in these expenses for extended periods of time.
- This functions exactly like a final reimbursement, but doesn't close out the travel.

Step 3 – Final Reimbursement

- Receipt organization:

- Organize by expense type, tape receipts to blank paper, and number each receipt.

- Long receipts can be cut, but include both parts.

- Provide currency conversions for **each** receipt paid in foreign currency. This should be done using the Oanda currency converter. Print or save PDFs for each conversion. This is optional, we can do it for you.

- <https://www.oanda.com/currency/converter/>

- Fill out the Final Reimbursement Form

- This form can be found in the website footer for any Anthropology website: <https://www.anthro.utah.edu>

Final Reimbursement Spreadsheet

Traveler Name		
Total Reimbursement		0
# of Days		
# of Nights		
Use Either Round Trip OR Sepparate Flights, Not Both		
Airfare (Round Trip)		
Ticket Total		
Fare		
Fees		0
Airfare (Sepparate Flights)		
Outbound Ticket Total		
outbond fare		
outbound fees		0
Return Ticket Total		
return fare		
return fees		0
Combined fares		0
Combined fees		0
Personal Vehicle (google maps directions or similar for mileage)		
Total		0
# of Miles		
Lodging		
Total		
Per night	#DIV/0!	

- Green Cells are editable, enter all available information into these.
- Grey cells contain formulas to calculate the individual values needed for the reimbursement form.
- Blue cells describe all expense categories allowed in the reimbursement system.
- Spreadsheet is protected to preserve the formulas, but you can unprotect it if you need to make custom changes.
 - This is under: review>>unprotect sheet

Airfare

- Can be pre-booked, is usually cheaper if purchased by traveler.
 - Early reimbursements are available for flights
- For the reimbursement form, the base fare and other fees/taxes are calculated separately. The reimbursement form will auto-calculate the taxes/fees for you based on the ticket total and fare total.
- Purchases through a third party (Expedia, Orbitz, etc...) are allowed.
- Fly America Act – Airfare purchased on a federal grant must use American airlines **when possible** for foreign travel.
- To pick a specific flight, please send the flight numbers, or share a Google Flights itinerary. Flights/prices can easily be found on flights.google.com

Personal Vehicle Reimbursement

- Two options exist for reimbursing the use of a personal vehicle for travel:
 - Exact fuel costs with receipts
 - Mileage reimbursement
 - \$0.58 per mile for general travel
 - \$0.20 per mile for permanent relocation
 - Mileage must be demonstrated by providing copies of a route mileage calculation using maps.google.com or similar.

Lodging

- Can be pre-booked, or reimbursed
 - Pre-booking requires a personal credit card on file. This card is not charged, even for the reservation, unless there are incidental charges to the room
- You **MUST** get an itemized receipt for the room, even if you pre-book, or get an early reimbursement. Travel is completely inflexible on this.
- Third party booking (Expedia, Orbitz, etc...) is allowed
- For non-standard lodging (Camping, staying with a friend etc...) there is a \$20 per diem style allowance. GSA Lodging per diem is not allowed.

Per Diem or Meals

- Two options exist for reimbursing food purchases:
 - Exact cost reimbursement. Requires **itemized** receipts
 - Can cover tip
 - Cannot cover alcohol. If you forget or are unable to split alcohol onto a different check, we can fix it in the office, but it is more difficult.
 - Per Diem. Does not require receipts
 - Per Diem is based on the GSA M&IE rate for the city you are in. These rates can be found at the [GSA website](#).
 - If you are provided free meals by a conference, the per diem must be adjusted, and first and last travel days are at a reduced rate. Exact details of the M&IE breakdown can be found on the GSA website
 - Taking full amount is not required, a single traveler cannot take both per diem and meal receipts for the same trip.

Conference

- Both membership and conference registration can be covered.
- Pre-booking is possible if all conference details and exact price are submitted. This is typically easiest by providing a link to the conference web page

Car Rental

- Car rental must be paid for by the traveler. The only method to avoid out-of-pocket cost is through a cash advance.
- To encourage use of the university fleet contracts (which includes insurance), travel will not reimburse rental insurance. This illogically includes areas where the university has no contracts. If you are renting in an area without university contracts, you will need a VP signature for an exception to policy (this signature is collected as part of the reimbursement process).
- Rental through university fleet services can be done with a chartfield rather than a personal card, and also provides access to This process is separate from travel reimbursement.

Transportation

- Anything but a plane. Trains, busses, taxis, lyfts, ubers, boats, etc...
- Provide receipts, it is covered in full.

Parking

- Any parking fees can be covered with a receipt.
- For Airport parking, parking for over 24 hours must be in the long-term parking.
- This does not include fines such as a parking ticket.

Internet Charges

- Includes in flight Wi-Fi, hotel Wi-Fi charges, and conference Wi-Fi.
- Must provide receipt.

Other

- Catch-all category. If you have questions for this, please ask us.
- Common Other category expenses: rental car fuel, field supplies/equipment, participant support, international health insurance.
- Two other categories allowed for each travel.