How to Complete Your Pre-Travel Approval and Reservation Request Form

This is the pre-travel form. It is required prior to any travel for which you will be conducting University business and using University funds. This includes but is not limited to grants, contracts, IDC, I&G. This form is used to request travel arrangements be made on your behalf by your administrator AND to share existing travel plans from which you will be requesting a reimbursement (including per diem). It should be received by your administrator as soon as possible after you have confirmed your travel plans to allow time for purchases to be completed.

	Pre-Travel A	pproval and Reservation	on Request	
		to travel. Submitting after travel will delay yo		
Date:	Banner ID:	Phone:	Email:	
Legal Name:	Birthdate:			
This form is used to request trave	el arrangements be made on your behalf. It shou	uld be received as soon as possible after yo	u have confirmed your itinerary to allow	v for purchase processing
	the arrangements you need made on a PCard A conal funds will be reimbursed post-travel. All			s Manual under Policy 40
Legs of Travel (Ex: ABQ-DEN	480)	Business Purpose	of Travel	
Legs of Travel (EX: ABQ-DEN	-ADQ)	business Purpose	of travel	
→ FLIGHT Preferred Vendor	Date Depart Time	Flight # Da	te Return Time Flight #	Index #:
Preferred vendor	Depart	Return		
				Est. Flight Expense
HOTEL Preferred Vendor	Check-In	Location Da	pay for a hotel with a PCard	a
	Check-III	Check Out	credit card authorization for is required to be turned in to the hotel prior to my stay.	Est. Hotel Expense
RENTAL CAR	Pick-Up	Location Da	ite Time Location	Index #:
	rick-op	Drop-Off	E	st. Rental Car Expense
WITH A PCARD	AVEL EXPENSES TO BE PAID	Conference registration:		Index #:
		Other:		Est. Other Expenses
	travel with your department chair. Dean sign	nature is required for international		
***Please communicate your t	by I&G, department chair signature is required th you are not the PI, PI signature is required.**	d on this form. If funding is provided	• • • Total Requested Pca	ard Purchases
travel.*** If funding is provided				
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Step 1 – Basic Information

Fill out the date, your banner ID, email, phone number, birthdate (this will be needed for reservations), your LEGAL name (as this will be what is on your reservations for your flight, hotel, car, etc.).

For example:

Date:	10/11/23	Banner ID:	101101223	Phone:	505-251-5486
Legal Name:	Louie Larry Lobo	Email:	lmlobo@unm.edu	Birthdate:	1/1/2005

Step 2 – Legs of Travel

Note your travel route. This does not include flight path stops. Your administrator does not need to know that your flight is stopping in Phoenix on your way to Los Angeles. For example:

Legs of Travel (Ex: ABQ-DEN-ABQ)

ABQ-LAX-ABQ

Step 3 – Business Purpose

Enter an acceptable business purpose. This includes a description of the who, what, where, when, and why of your trip. An <u>acceptable</u> business purpose would read as follows:

I will travel to Los Angeles, CA on from 10/28/23-11/4/23 to organize, gather, and scan high-resolution images at the Huntington Library archives that will be used in my forthcoming book publication. The majority of my book images are in the Huntington's archives. The book is currently under contract with the University of California Press and the manuscript is due 12/1/23. This research is necessary for my tenure-track advancement the completion of his peer-reviewed book manuscript.

An unacceptable business purpose:

Going to LA to visit libraries.

Step 4 – Flight, Hotel, Rental Car, Other Expenses.

For this next section, you will let your administrator know what arrangements you would like them to make on your behalf. A checked box indicates that you need those items booked for you. If you have booked and paid for any of the expenses <u>DO NOT</u> check the box next to the category. If you have purchased the item already, select "actual expense".

If you need the item purchased for you (flight, hotel, etc.) select "estimated expense".

To clearly indicate whether you have booked or need your reservation booked for you, please select "actual" or "estimated" expense. Actual = you have booked. Estimated = need your reservation booked for you.

If you are requesting your administrator book the expense for you, include the estimated expense for them – it will help guide them with the purchase.



A NOTE ABOUT INDEX NUMBERS AND ESTIMATED VS. ACTUAL EXPENSES PLEASE DO NOT LEAVE THIS SECTION BLANK!

Index number and estimated expense or actual expense MUST BE FILLED OUT. It is the responsibility of the traveler to have the index number and <u>not only the name of the index</u>. If you do not know the index number you are billing, check with your administrator. If, at the time of expense reconciliation, your administrator does not have an index number, your administrator will make their best guess for what index number to charge. This expense may need to be moved from one index to another at a later date.

FLIGHT

In this example you are requesting flight Southwest 2445, departing from Albuquerque at 6am on 10/28/23 to be **booked for you** with a return from LAX airport on flight 2478 at 8:30pm on 11/4/23:

Help me book my flight!

	Date	Depart Time	Flight #	Detum	Date	Return Time	Flight #	Index #:	515000
Southwest	part 10/28/23	6am	2445	Return	11/4/23	8:30pm	2478	Actual Expense Estimated Expense	425.00

In this example **you have already booked your flight** to Los Angeles (the unchecked box indicates this). If you have booked your own flight, the flight information needs to be entered here. Whether your flight is booked by yourself or your administrator books it for you, the flight information must be provided for your administrator to review.

I booked my own flight!



HOTEL/LODGING

In this example you are **requesting your administrator book your hotel** at the Courtyard LA with a check in on 10/28/23 at 2pm and a check out on 11/4/23. Estimated cost is noted.

Help me book my hotel!



A NOTE ABOUT HOTEL AUTHORIZATION FORMS

If you are requesting your hotel to be booked by your administrator you will need to acknowledge that a credit card authorization form is required prior to your stay to pay with a PCard. If a credit card authorization form is not received by the hotel's deadline the traveler will be required to pay for the cost with personal funds and seek a reimbursement for the cost after the travel is concluded. Hotels often have strict deadlines for credit card authorization forms.

I acknowledge that in order to pay for a hotel with a PCard a credit card authorization form is required to be turned in to the hotel prior to my stay.

Please make yourself aware of the deadline and check with your administrator for its status.

In this example **you have already booked your own hotel** (the unchecked box indicates this) for your trip to LA and therefore have included the <u>actual</u> expense is indicated here. No acknowledgement of credit card authorization is needed in this example as you have already paid for the hotel stay (see exact amount in estimated hotel expense field) and will not need your stay paid for via PCard.

I booked my own hotel!



RENTAL CAR

In this example **you are requesting a rental car be booked for you** from 10/28/23-11/4/23 for pickup at your arrival location – LAX airport. Estimated expense is noted.

Help me book my ren	tal car!									
RENTAL CAR	Pick-Up	Date 10/28/23	Time 10am	Location LAX	Drop-Off	Date 11/4/23	Time 5pm	Location LAX	Index #:	515000 600.00
									Estimated Expense	

In this example **you have already booked your rental car** for Los Angeles from 10/28/23-11/4/23 to be picked up and dropped off at LAX airport. Actual expense is noted.

15000 45.20

<mark>od I</mark>	oked my own rental ca	r:								
\mathbf{O}	RENTAL CAR	Date	Time	Location		Date	Time	Location	Index #:	5
	PICK	Up 10/28/23	10am	LAX	Drop-Off	11/4/23	5pm	LAX	Actual Expense Estimated Expense	7

OTHER ESTIMATED TRAVEL EXPENSES TO BE PAID WITH A PCARD

This last section gives your administrator instruction on what the other upfront costs of your trip will be and what purchases they will need to complete prior to your travel. In this example, only a day pass to a library is needed.

Purchase this for me!

البحج المحمد متربيه المعالم وال

 OTHER TRAVEL EXPENSES TO BE PAID WITH A PCARD	Conference registration:	Library Day Pass - purchase online	6.00	Index #:	515500
Do not include per diem here.	Other:			Actual Expense Estimated Expense	6.00

You're done!

Once your travel is complete, submit a Post-Travel Reimbursement Form to begin your reimbursement request.

Here is an example of what your form may look like when requesting flight, hotel, and other expense to be paid prior to travel.

To be submitted prior to travel. Submitting after travel will delay your reimbursement. Date: 10/11/23 Banner ID: 10/10/223 Processor 2005-251-5486 Enail: 10/00@@@@@@@@@@@@@@@@@@@@@@@@@@@@@@@@@@			F	Pre-Travel	Approva	al and Res	ervation R	equest			
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Traveler	WHEN			No. 101							

Collect the applicable signatures and return to your administrator.

*Dean signature is required for international travel. If funding is provided by I&G, department chair signature is required on this form. If funding is provided by a grant or contract from which you are not the PI, PI signature is required. If funding is from another department within UNM, signature is required from the manager of those funds. If you have questions regarding the signature(s) required for your travel, see your administrator. *

Please direct questions regarding the form or process to your administrator.