


## 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 Approval and Reservation Request

\*\*\*To be submitted prior to travel. Submitting after travel will delay your reimbursement.\*\*\*

Date:  Banner ID:  Phone:  Email:

Legal Name:  Birthdate:

This form is used to request travel arrangements be made on your behalf. It should be received as soon as possible after you have confirmed your itinerary to allow for purchase processing time. Please check the boxes for the arrangements you need made on a PCard AND estimated expenses. These estimations may differ from actual totals.  
 Note: purchases made with personal funds will be reimbursed post-travel. All UNM travel policies can be referenced in the Administrative Policies and Procedures Manual under Policy 4030.

Legs of Travel (Ex: ABQ-DEN-ABQ)	Business Purpose of Travel																				
<input type="checkbox"/> <b>FLIGHT</b> <small>Preferred Vendor</small>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; border-bottom: 1px solid black;"> <b>Depart</b> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;"><small>Date</small></td> <td style="width: 25%;"><small>Depart Time</small></td> <td style="width: 25%;"><small>Flight #</small></td> <td style="width: 25%;"></td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td></td> </tr> </table> </td> <td style="width: 50%; border-bottom: 1px solid black;"> <b>Return</b> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;"><small>Date</small></td> <td style="width: 25%;"><small>Return Time</small></td> <td style="width: 25%;"><small>Flight #</small></td> <td style="width: 25%;"></td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td></td> </tr> </table> </td> </tr> <tr> <td style="border: none;"></td> <td style="border: none; text-align: right;"> <small>Index #:</small> <input style="width: 50px;" type="text"/>  <small>Est. Flight Expense</small> <input style="width: 50px;" type="text"/> </td> </tr> </table>	<b>Depart</b> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;"><small>Date</small></td> <td style="width: 25%;"><small>Depart Time</small></td> <td style="width: 25%;"><small>Flight #</small></td> <td style="width: 25%;"></td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td></td> </tr> </table>	<small>Date</small>	<small>Depart Time</small>	<small>Flight #</small>		<input type="text"/>	<input type="text"/>	<input type="text"/>		<b>Return</b> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;"><small>Date</small></td> <td style="width: 25%;"><small>Return Time</small></td> <td style="width: 25%;"><small>Flight #</small></td> <td style="width: 25%;"></td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td></td> </tr> </table>	<small>Date</small>	<small>Return Time</small>	<small>Flight #</small>		<input type="text"/>	<input type="text"/>	<input type="text"/>			<small>Index #:</small> <input style="width: 50px;" type="text"/> <small>Est. Flight Expense</small> <input style="width: 50px;" type="text"/>
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\*\*\*Please communicate your travel with your department chair. 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.\*\*\*

• • •

**Total Requested Pcard Purchases**

0.00

Traveler:

### 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 acceptable 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 DO NOT 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.

**You booked this expense**

Actual Expense

Estimated Expense

**You need this expense booked for you**

Actual Expense

Estimated Expense

**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 not only the name of the index. 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!

<input checked="" type="checkbox"/>	→ <b>FLIGHT</b> Preferred Vendor Southwest	Depart	Date	Depart Time	Flight #	Return	Date	Return Time	Flight #	Index #:	515000
			10/28/23	6am	2445		11/4/23	8:30pm	2478		<input type="radio"/> Actual Expense <input checked="" type="radio"/> Estimated Expense

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.



## 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 rental car!

<input checked="" type="checkbox"/>	<b>RENTAL CAR</b>								Index #: 515000
	Pick-Up	Date	Time	Location	Drop-Off	Date	Time	Location	
		10/28/23	10am	LAX		11/4/23	5pm	LAX	
									Actual Expense
									Estimated Expense
									600.00

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.

I booked my own rental car!

<input type="checkbox"/>	<b>RENTAL CAR</b>								Index #: 515000
	Pick-Up	Date	Time	Location	Drop-Off	Date	Time	Location	
		10/28/23	10am	LAX		11/4/23	5pm	LAX	
									Actual Expense
									Estimated Expense
									745.20

## 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!

<input checked="" type="checkbox"/>	<b>OTHER TRAVEL EXPENSES TO BE PAID WITH A PCARD</b>								Index #: 515000
	<a href="#">Do not include per diem here.</a>	Conference registration:	Library Day Pass - purchase online	6.00					Actual Expense
		Other:							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.



### Pre-Travel Approval and Reservation Request

\*\*\*To be submitted prior to travel. Submitting after travel will delay your reimbursement.\*\*\*

Date:  Banner ID:  Phone:  Email:

Legal Name:  Birthdate:

*This form is used to request travel arrangements be made on your behalf. It should be received as soon as possible after you have confirmed your itinerary to allow for purchase processing time. Please check the boxes for the arrangements you need made on a PCard and the estimated expense for each item. These estimations may differ from actual totals.  
**Note: purchases made with personal funds will be reimbursed post-travel. All UNM travel policies can be referenced in the Administrative Policies and Procedures Manual under Policy 4030.***

Legs of Travel (Ex: ABQ-DEN-ABQ)	Business Purpose of Travel
<b>ABQ-LAX-ABQ</b>	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.

<input checked="" type="checkbox"/>	<b>FLIGHT</b> <small>Preferred Vendor</small> Southwest	Depart <input type="text" value="10/28/23"/> <input type="text" value="6am"/> <input type="text" value="2445"/>	Return <input type="text" value="11/4/23"/> <input type="text" value="8:30pm"/> <input type="text" value="2478"/>	Index #: 515000 Actual Expense Estimated Expense 425.00
<input checked="" type="checkbox"/>	<b>HOTEL</b> <small>Preferred Vendor</small> Courtyard Los Angeles	Check-In <input type="text" value="10/28/23"/> <input type="text" value="2pm"/> <input type="text" value="LA"/>	Check Out <input type="text" value="11/4/23"/>	Index #: 515000 Actual Expense Estimated Expense 1,400.00 <small>When paying with a PCard, I acknowledge that a credit card authorization form is required by the hotel prior to your stay.</small>
<input type="checkbox"/>	<b>RENTAL CAR</b>	Pick-Up <input type="text" value="10/28/23"/> <input type="text" value="10am"/> <input type="text" value="LAX"/>	Drop-Off <input type="text" value="11/4/23"/> <input type="text" value="5pm"/> <input type="text" value="LAX"/>	Index #: 515000 Actual Expense Estimated Expense 600.00
<input checked="" type="checkbox"/>	<b>OTHER TRAVEL EXPENSES TO BE PAID WITH A PCARD</b> <small>Do not include per diem here.</small>	Conference registration: <input type="text" value="Library Day Pass - purchase online"/> <input type="text" value="6.00"/>	Other: <input type="text"/>	Index #: 515500 Actual Expense Estimated Expense 6.00

**Total Estimated Cost**

\*\*\*Please communicate your travel with your department chair. 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.\*\*\*

Traveler

Collect the applicable signatures and return to your administrator.

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