

Pre-Travel Approval and Reservation Request

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

See the following pages for assistance with completing this form.

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

 FLIGHT <small>Preferred Vendor</small>	Depart			Return			Index #:
	Date	Depart Time	Flight #	Date	Return Time	Flight #	Actual Expense Estimated Expense

 HOTEL <small>Preferred Vendor</small>	Check-In		Check Out		<small>When paying with a PCard, I acknowledge that a credit card authorization form is required by the hotel prior to your stay.</small>	Index #:
	Date	Time	Date	Time		Actual Expense Estimated Expense

 RENTAL CAR	Pick-Up			Drop-Off			Index #:
	Date	Time	Location	Date	Time	Location	Actual Expense Estimated Expense

OTHER TRAVEL EXPENSES TO BE PAID WITH A PCARD <small>Do not include per diem here.</small>	Conference registration:	Index #:
	Other:	Actual Expense Estimated Expense


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 Estimated Cost**

Traveler

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.

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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"/>	→ FLIGHT 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"/>	RENTAL CAR								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"/>	RENTAL CAR								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"/>	OTHER TRAVEL EXPENSES TO BE PAID WITH A PCARD								Index #: 515000
	Do not include per diem here.	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: 10/11/23 Banner ID: 101101223 Phone: 505-251-5486 Email: lmlobo@unm.edu

Legal Name: Louie Larry Lobo Birthdate: 1/1/2005

*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
ABQ-LAX-ABQ	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"/>	FLIGHT <small>Preferred Vendor</small> Southwest	Depart: Date 10/28/23, Depart Time 6am, Flight # 2445	Return: Date 11/4/23, Return Time 8:30pm, Flight # 2478	Index #: 515000 Actual Expense: 425.00 Estimated Expense: 425.00
<input checked="" type="checkbox"/>	HOTEL <small>Preferred Vendor</small> Courtyard Los Angeles	Check-In: Date 10/28/23, Time 2pm, Location LA	Check Out: Date 11/4/23	Index #: 515000 Actual Expense: 1,400.00 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"/>	RENTAL CAR	Pick-Up: Date 10/28/23, Time 10am, Location LAX	Drop-Off: Date 11/4/23, Time 5pm, Location LAX	Index #: 515000 Actual Expense: 600.00 Estimated Expense: 600.00
<input checked="" type="checkbox"/>	OTHER TRAVEL EXPENSES TO BE PAID WITH A PCARD <small>Do not include per diem here.</small>	Conference registration: Library Day Pass - purchase online 6.00	Other:	Index #: 515500 Actual Expense: 6.00 Estimated Expense: 6.00

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 Estimated Cost 2,431.00

Signature
 Traveler

Signature

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.