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.

<table>
<thead>
<tr>
<th>Date:</th>
<th>Banner ID:</th>
<th>Phone:</th>
<th>Email:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legal Name:</td>
<td>Birthday:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Log of Travel (Ex: ABQ-DEN-ABQ)</th>
<th>Business Purpose of Travel</th>
</tr>
</thead>
</table>

- **FLIGHT**
  - Preferred Vendor
  - Depart Date
  - Depart Time
  - Flight #
  - Return Date
  - Return Time
  - Flight #

- **MOTEL**
  - Preferred Vendor
  - Check In Date
  - Check In Time
  - Location
  - Check Out Date
  - Check Out Time
  - Location

- **RENTAL CAR**
  - Pick-Up Date
  - Pick-Up Time
  - Location
  - Drop Off Date
  - Drop Off Time
  - Location

- **OTHER ESTIMATED TRAVEL EXPENSES TO BE PAID WITH A PCARD**
  - Conference registration:
  - Index #:
  - Other:
  - Est. Other Expenses
  - Total Requested Pcard Purchases

***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.***
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:

<table>
<thead>
<tr>
<th>Date:</th>
<th>10/11/23</th>
</tr>
</thead>
<tbody>
<tr>
<td>Banner ID:</td>
<td>101101223</td>
</tr>
<tr>
<td>Phone:</td>
<td>505-251-5486</td>
</tr>
<tr>
<td>Legal Name:</td>
<td>Louie Larry Lobo</td>
</tr>
<tr>
<td>Email:</td>
<td><a href="mailto:lmlobo@unm.edu">lmlobo@unm.edu</a></td>
</tr>
<tr>
<td>Birthdate:</td>
<td>1/1/2005</td>
</tr>
</tbody>
</table>

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 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.

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!

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. 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 actual 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 rental car!

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!

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!

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.

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.