

Step-by-Step Travel Planning

Before the planning steps, the first thing you need to do (if you haven't already done so) is log into the online travel software Chrome River and add Nancy Thomas as your delegate. If you need help with that, contact Nancy and she'll walk you through it. Then, you're ready to begin planning.

1. **Approval** from the Department Chair must be obtained **prior** to making travel arrangements. Email your desired travel plans, including any information you have, to Department Chair and wait for a response. Once approved, continue to Step 2.
2. **Coordinate** your travel.
 - a. If more than one person from the department is attending the same event, travel should be coordinated to maximize cost-effectiveness; i.e. riding together, sharing a hotel room, etc. **Only one person from the department will be reimbursed for mileage or rental car unless an acceptable justification for taking separate vehicles is approved by the Department Chair and brief explanation written on your travel request.**
 - b. For travel involving **airfare**, try to plan your trip as far in advance as possible to avoid last minute airfare increases.
3. **Forms**: Complete the **Travel Planning Worksheet** located on the Faculty Resources page of the Department of Nursing website, and give to Nancy or put in her mailbox. Virtual faculty should email to: nancy.thomas@angelo.edu. The online **Pre-Approval (PA)** report is filled out by Nancy using the information provided in the Travel Planning Worksheet. **The PA must be fully approved by the Travel Office prior to travel, so your Travel Planning Worksheet needs to be turned in with ample time for processing. If you turn in your Travel Planning Worksheet after your travel, you will NOT receive reimbursement for your travel expenses.**
 - a. If any ASU employee is in town but off campus on university business for more than four hours (conference, workshop, symposium, etc.), even if there's no reimbursement requested, you must turn in a Travel Planning Worksheet so a PA can be submitted to Travel.
4. **Transportation: The amount of mileage reimbursement may not exceed the average coach airline fare.** If you choose to travel by personal vehicle for trips that exceed the maximum allowed miles, you will be reimbursed for the least expensive mode of transportation. For travel by personal vehicle within the allowed miles, you will be reimbursed the state maximum mileage reimbursement rate. You will NOT be reimbursed for gas when driving your personal vehicle, only rental vehicles; mileage reimbursement covers gas and normal vehicle wear and tear.
 - a. **Rental Car**: The most cost-effective means of transportation when driving is using a rental car, especially since the state will **not** reimburse for damages to your personal vehicle (flat tire, cracked windshield, etc.). **Rental car reservations need to be made using Enterprise, Avis, or Hertz.** When picking up your rental car, make the agent aware that you are a state employee so that the correct contracted rate is given (**State Exempt ID numbers: Enterprise TX737, PIN ANG; Avis F999737; Hertz 2120737**). Also, please be sure to present the **Rental Vehicle Tax Exemption Form** to be exempt from taxes/fees. You can find the **Rental Vehicle Tax Exemption Form** on the Faculty Resources page of our Department of Nursing website. Upon returning the rental car, request an itemized receipt showing traveler's name and proof of payment (\$0.00 balance due). Make sure that state tax has not been charged (if in Texas). With proper receipts, you will be reimbursed the rental cost plus gas.
PLEASE NOTE: The state will not authorize additional insurance or non-state-approved charges/fees, such as upgrading from a standard vehicle to a premium vehicle, Roadside Assistance Protection, etc. Should your receipt contain such charges/fees, you will not receive reimbursement for them.

- b. **Air:** If your travel requires flight reservations, submit your flight preferences along with your Travel Planning Worksheet, and Nancy will make flight reservations for you through Horizons Travel. Once the flight has been booked and paid for by the Travel Office, a flight confirmation will be emailed to you. **NOTE: The Travel Office cannot purchase your airfare until your PA has been fully approved.**
5. **Hotel:** If your travel requires overnight accommodations, you will need to make your hotel reservations at a **state rate contracted hotel**. [Hotel Engine](#) is an online hotel booking platform that has replaced the hotel directory listing. **Do NOT make your reservations through online sites such as Expedia, Travelocity, Booking.com, etc.** Either use the online [Hotel Engine](#) or **CALL the hotel's direct number** so you can request the state rate. Then **forward the hotel confirmation email to Nancy**. Virtual faculty traveling here (to San Angelo) must make their reservations at Wingate-Wyndham or Fairfield Inn by calling their local number: 325-703-6434 or 325-482-8400 respectively. **Please make sure to tell them you are an ASU employee and need the ASU rate.** **NOTE: If you make reservations at a hotel that does not offer the contracted state rate, you will need to include a statement of justification for choosing that hotel... otherwise you will only be reimbursed for the state rate.** **Also, if your trip does not include overnight stay, the state will not reimburse you for meals.**
6. **Registration Fee:** Conferences or meetings that include a registration fee of under \$1,000 can be paid by using the department ProCard (see Nancy for more information). A registration fee of \$1,000 or more can be paid with a Purchase Order only if that is an allowed payment option AND there is enough time for the Purchasing Office to mail the check before the deadline. Otherwise, you will be required to pay the registration fee with a personal credit card, and be reimbursed.
7. Once your PA has been fully approved, the requested University paid expenses can be processed by the Travel Office (airfare and registration fee).
8. **Enjoy your trip!**
 - a. For trips requiring overnight stay, remember to bring a [Hotel Tax Exemption form](#) with you so the hotel will not charge you state tax. **If you pay state tax, you will NOT be reimbursed for that amount.** You can find the Hotel Tax Exemption form on the Faculty Resources page of our Department of Nursing website.
 - b. Save all **original** receipts (hotel, registration fee, taxi/shuttle, rental car, gas [only with a rental car], parking, baggage fee, meals).
 - c. You will be reimbursed only for your **actual** meal and lodging expenses not to exceed the maximum reimbursement rate for that location. The state travel expense reimbursement rate is NOT a per diem. This is why receipts are required for reimbursement.
 - d. **Keep in mind that you are required to pay all of your single share of expenses while traveling. You will be reimbursed only for your own expenditures. Reimbursements for expenditures incurred by other individuals are not allowed. DO NOT pay for another individual's meal or hotel stay and request to be reimbursed.**
 - e. Rental car, lodging, and meal expenses are not reimbursable during any **personal days** while traveling.
9. **Upon your return**, gather all required **original** receipts and give them to Nancy or put in her mailbox (USPS mail for virtual faculty). Do **NOT** use a highlighter on food or gas receipts. **You do not need to fill out any forms.** The online Expense Report will be completed by Nancy.
 - a. **NOTE:** Reimbursement requests submitted 60-90 days after your return must include an explanation as to the reason for lateness. These requests require additional levels of approval and may run the risk of being disallowed. (See [OP 70.04](#) for more information.)

- b. Travel expenses submitted later than 90 days after the ending date of travel will not be processed, and funds will be unencumbered. (See [OP 70.04](#) for more information.)
10. Once the Expense Report is approved by the Travel Office, your expenses will be processed and sent to Accounts Payable for approval and reimbursement.
11. **FOR GRADUATE FACULTY ONLY:** Upon returning from trip, turn in all receipts to Nancy and complete the [State Travel Form](#) (click on link, enter the required information into the online form, and submit). The [State Travel Form](#) link is also available on the Faculty Resources page of our Department of Nursing website. Because the **graduate faculty** are reimbursed through state funds, the state requires a completed **Travel Voucher form** and **Travel Management Compliance Certification form**. These forms will be emailed directly to the graduate faculty traveler from the Travel Office once they receive your online Expense Report and State Travel Form. You will need to print both forms according to the instructions included in the email, sign and date where it says **Claimant** or **Employee**, and then give them to Nancy (her mailbox or USPS mail for virtual faculty). **The state will only accept original signatures on these forms, so they cannot be faxed or emailed.** Once Nancy receives your signed forms, she will obtain the Department Chair's signature, and then forward both forms to the Travel Office.
12. Once the Travel Office receives all signed forms, your paperwork will be processed and sent to Accounts Payable for approval and reimbursement.
13. If you have any questions, please contact Nancy at ext. 6873 (325-486-6873) or email her at nancy.thomas@angelo.edu.