DEPARTMENT of PSYCHIATRY
TRAVEL Policies and Procedures

Coordinating, planning, scheduling, and paying for travel at the University of New Mexico is a complex process. Forethought, attention to detail, and timely submissions ensure a smooth process. Faculty and staff must be familiar with the University’s Travel Policy http://www.unm.edu/~ubppm/ubppmanual/4030.htm

- We are all responsible for being fiscally disciplined and prudent with University funds.
- Faculty and staff are required to sign a Department of Psychiatry Travel Agreement before travel will be paid on P-Card. The agreement, along with other forms, is included at the end of this booklet.

BEFORE YOU TRAVEL

Prior planning is crucial. Reservations should be made as soon as you know you will be traveling.

Below are instructions to help you schedule your travel in the most efficient way possible.

Pre-Travel Request Form
This form should be provided to P-card holder to make travel reservations. Please complete the form, make notes as needed, and submit to the P-card holder as soon as approval is granted.

Complete the Pre-Travel Request Form as soon as you know you will need any or all of the following:
- Airfare
- Hotel
- Conference registration
- Airport Transfer / Rental Car

The Pre-Travel Request Form must be completed and signed by requestor and PI/Supervisor before any travel arrangement may be made.

- Failure to complete the form accurately and in its entirety may result in
  - a delay to fulfill your request
  - an inability to fulfill your request

Things to Consider:
- Personal Travel Note: If you plan to take personal travel during your business travel you must
  - get a comparison on your transportation before you travel, not afterwards
    - comparison flights need to be done at the same time actual flights are scheduled
    - turn in with Pre-Travel Request form

Faculty and Staff:
- In-state travel: Reservation requests must be received by P-card holder at least 48 business hours prior to travel.
- Out-of-state travel: Reservation request should be received as soon as you know you will need to travel, and far enough in advance to be able to receive the lowest available airfares/conference fee/hotel fee.
- International travel: Reservation requests require substantial planning and require prior approval from PI/Supervisor and Department Chair. Expenses will not be reimbursed without prior approval.
**Business Purpose:**
As with all financial purchases/reimbursements at UNM, you must provide the following for all transactions:
- Index #/Grant to be charged
- Business Purpose and benefit to UNM/Contract/Grant (Why are you traveling? Why it benefits the University/Department) - (Example, “In my role, I am required to attend the APA Annual Meeting for continuing medical education and quality patient care.”)

This is important. The more information we collect from you up front, the greater the likelihood that we will be able to complete the transaction in a timely manner with full reimbursement.

A p-card holder will make your travel reservations and will email you the confirmation numbers. Check with the P-Card holder if you have not received this information in plenty of time before you travel.

**Payment For Travel:**
Travel is paid by using:

- **UNM Purchasing Card (PCard):**
  - **Preferred method**
  - Use to purchase: Airfare (including baggage fees), hotel, conference registration and ground transportation
  - Required: Completed Post-Travel Reimbursement request and receipts
    - must be turned in within 10 days following travel
  - Failure to follow these guidelines may result in
    - discontinued use of the P-Card services
    - requirement that traveler use personal funds and submit for reimbursement after travel has been completed

- **Personal Funds:**
  - Individual travelers may purchase certain travel and request reimbursement after travel is completed
  - Required: Use personal funds only for
    - cab fare
    - meals
    - shuttle
    - parking
    - internet fees at a hotel
    - gas (personal vehicle and rental car)
    - other unforeseen expenses
  - Required: Completed reimbursement request and receipts
    - must be turned in within 10 days following travel

**Note:** Early check-in cannot be paid on P-Card and is not reimbursable, regardless of payment method.

**Rental Car Specifics:**
Travelers are encouraged to use cost effective public transportation when available, but are authorized to rent automobiles when necessary. The business purpose needed for the rental car must be fully explained on the reimbursement request. Policy 4030 7.3 [http://www.unm.edu/~ubppm/ubppmanual/4030.htm](http://www.unm.edu/~ubppm/ubppmanual/4030.htm).
If you are unable to give proper notice to reserve a car, you may make a reservation through the UNM Travel Portal [http://www.campustravel.com/university/unm/index.html](http://www.campustravel.com/university/unm/index.html). Follow the link for Faculty and Staff> Car Rental> Enterprise.

It is your responsibility to make sure you get the UNM rate [request the UNM rate and use the appropriate code Enterprise: NA34302; National: 5420154] and provide:
• Name
• Driver’s License
• Personal credit card

when you pick up the car. All info and receipts must be turned in to the P-card holder within **48 business hours** after travel has ended.

• **Fuel:** *Gas cannot be charged to the PCard.* Choose the option at the rental office indicating that you will return the car with a full tank of gas.

• **Rental Car vs. Personal Vehicle:** Plan on the most cost-effective method of transportation for your travel. Generally, for shorter trips, it is more cost effective to reimburse you for using your personal vehicle rather than using a rental car. Below is an example of a break down (based on one driver/vehicle) demonstrating preferred mode of transportation for various communities:

Last updated 7/20/2012 – Check with P-card holder for most updated information.

<table>
<thead>
<tr>
<th>Rental Car or Personal Vehicle Preferred</th>
<th>Location (single day/24 hour rental, unless noted)</th>
<th>Savings (over the alternative)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rental Car</td>
<td>Alamo</td>
<td>$43</td>
</tr>
<tr>
<td></td>
<td>Crownpoint</td>
<td>$46</td>
</tr>
<tr>
<td></td>
<td>Farmington</td>
<td>$76</td>
</tr>
<tr>
<td></td>
<td>Gallup</td>
<td>$53</td>
</tr>
<tr>
<td></td>
<td>Grants</td>
<td>$12</td>
</tr>
<tr>
<td></td>
<td>Mescalero</td>
<td>$96</td>
</tr>
<tr>
<td></td>
<td>Nageezi</td>
<td>$49</td>
</tr>
<tr>
<td></td>
<td>Ramah</td>
<td>$47</td>
</tr>
<tr>
<td></td>
<td>Roswell</td>
<td>$95</td>
</tr>
<tr>
<td></td>
<td>Santa Clara</td>
<td>$17</td>
</tr>
<tr>
<td></td>
<td>Silver City (2 days)</td>
<td>$114</td>
</tr>
<tr>
<td></td>
<td>Window Rock</td>
<td>$66</td>
</tr>
<tr>
<td>Personal Vehicle</td>
<td>Acoma Pueblo</td>
<td>$35</td>
</tr>
<tr>
<td></td>
<td>Kewa (Santo Domingo)</td>
<td>$20</td>
</tr>
<tr>
<td></td>
<td>Laguna</td>
<td>$14</td>
</tr>
<tr>
<td></td>
<td>San Felipe</td>
<td>$25</td>
</tr>
<tr>
<td></td>
<td>Santa Fe</td>
<td>$10</td>
</tr>
<tr>
<td></td>
<td>To’hajilee</td>
<td>$12</td>
</tr>
</tbody>
</table>

• **Length of Use:** Rental cars may only be reserved for the time necessary to complete the work. They are charged to the grant/index for which the travel was required. Their use is for work/contract-related travel.

⚠️ Matters of convenience may not be used as considerations in determining when to pick up or turn in a rental car. For example, you may not keep a car an extra day/ pick up early simply because it fits better into your schedule. Transparency is crucial; always think “how would I explain this to an auditor?” or “how would this look on the front page of the newspaper?”

**DURING YOUR TRAVEL**

Be sure to keep the following documentation, as it will need to be submitted promptly upon your return:
• Receipts
  o Airfare
  o rental car
  o parking
  o gas
  o cab fare
  o meals (if needed)
  o hotel
  o other
• Hotel
  o Be sure to check that only the cost of the room and applicable taxes appear on your hotel receipt, especially if your hotel was paid for with the UNM P-Card.
  o The hotel receipt should show a zero balance if paid for by the UNM P-Card.
  o If other charges (internet, room service, phone calls, movies, etc.) appear on the bill, you will no longer be able to have your hotel pre-paid for by UNM P-Card.

This is explicitly detailed in the Department of Psychiatry Travel Memo and is a one-strike rule.

• Conference/Meeting agendas- These are required to determine per diem, and what meals were supplied vs. need to be reimbursed.
• Flight itinerary- Boarding pass stubs when available. Comparison flights are needed if combining with personal travel.
• Personal travel combined with business travel with additional destinations and airfare cannot be booked on P-Card regardless of cost.

After Your Travel

Submit the Post-Travel Reimbursement form to the P- card holder within 10 days following any travel that involves more than mileage.

Complete the Post-Travel Reimbursement form or the Mileage Only form. Failure to complete the form accurately and in its entirety will result in a delay in your reimbursement.

Completed travel reimbursements must be submitted by the P- card holder to the Financial Services accounting office within 20 business days of the travel to avoid the taxable benefit IRS rule.

Mileage Only forms can be submitted monthly with prior approval from PI/Supervisor. Frequent travelers should turn in mileage weekly.

Complete the form in its entirety
• Provide your UNM Banner ID
• Provide which index code/contract/grant the travel is to be charged to. If doubt, ask.
• Provide a detailed business purpose and the benefit to UNM.
• Arrivals and departures: Provide the date and time of arrival and departure at each location.
• Receipts: Attach all original receipts and conference or meeting agendas (rental car, hotel, food, etc.). If a receipt is smaller than an 8 ½ X 11 piece of paper, tape it using clear tape only onto an 8 ½ X 11 piece of paper.
• If you drive your own car out of state, the airfare quote must reflect pre-travel comparison costs and be attached. Also attach map of mileage so we can show comparison.
• Complications/Anamolies: Anything that is not clearly understandable/straightforward on your travel request needs to be explained in detail. Financial Services will ask to make sure we are properly and fully compensating employees and to ensure that we are spending UNM funds appropriately.
• Conference/Meeting Agendas need to be attached.
• If original receipts are unavailable, attach a signed statement certifying that no other reimbursement claim will be submitted to any other entity.

Do not staple.

This statement must be signed by the director or department chair, indicating that the department assumes responsibility for duplicate payment.

Examples:
• You drive to a community, but are not requesting mileage. Why? (e.g., You drove with a co-worker).
• You fly to a town, but do not have a hotel reimbursement. Why? (e.g., You stayed with a friend).
• If you stay with someone or someone else pays for your expenses, make detailed notes.

If you are unsure how to complete the form, please ask for help.

When can you expect reimbursement?
As a UNM employee, your reimbursement will be directly deposited. After your completed reimbursement request has been processed, it typically takes 2 weeks for reimbursement to be received.

Forms

Departmental Travel Forms are described below. These forms can be found on the Department Website http://psychiatry.unm.edu/EmployeeResources/forms/travel-forms.html

Use the following forms for your travel

Pre-Travel Request Form
This form must be completed and signed by requestor and PI/Supervisor before any travel arrangement may be made. Failure to complete the form accurately and in its entirety may result in a delay to fulfill your request or an inability to fulfill your request

Mileage Only Form
Complete when you are only requesting mileage reimbursement. Mileage only may be turned in monthly, with prior approval from PI/Supervisor.

Post-Travel Reimbursement Form
This form should be completed when you are requesting travel reimbursement that includes airfare, per diem, hotel, etc. A completed Post-Travel Reimbursement form is required to be submitted to the P- card holder within 10 calendar days following your travel.