

BINGHAMTON UNIVERSITY

Philosophy Department

TRAVEL CHECKLIST

BEFORE TRAVELING: An electronic signed “Request and Authorization for Travel” form (R & A) must be submitted by the department office at least two weeks prior to departure. The R&A and Risk Management forms **MUST** be approved prior to travel or you will **NOT** be reimbursed. If it is university business, an R & A must be submitted, even if traveler is not asking for funding. All purchases and corresponding receipts must be in the traveler’s name.

- ____ 1. **Amount requesting:** At least two weeks before travel, advise staff of your travel plans. If you are requesting department funding, email the Chair for approval and forward the email to Amy at alee@binghamton.edu. The department will send you a PDF form to complete. Once you complete the form, you will receive an email from “travel” for you to approve the R & A. You must log in with your PODS ID to approve this.
- ____ 2. **Air Fare Control Number is REQUIRED.** The Travel Office must have the completed R&A with electronic signatures before a Control Number can be issued. **Do NOT make airline reservations at Direct Travel/Concur without the BU Control Number.** Once you receive the BU Control number, contact Direct Travel at 1(800)774-0655 or highered@dt.com. If you need assistance outside of normal business hours, call the phone number listed above & press Option 8. Your call will be directed to the Emergency After Hours Service. Additional fees may apply for calls outside of business hours and should be used for Emergency Travel services. They will email the final itinerary to you with e-ticket; please **forward this email to Amy at alee@binghamton.edu**.
- ____ 3. **Hotel Information:** Justification is required if the hotel rate is above the allowed per-diem. The exception is if the lodging is at the conference site. (If over per diem, you will need to choose the least expensive hotel out of 3, near the conference location. ***The following hotel locations are NYS tax exempt with the correct purchase method: New York, Maine, Missouri, New Jersey, North Dakota and Rhode Island and Florida. (Please ask staff for a NYS tax exempt form to take with you)**
- ____ 4. **Class Coverage:** If classes will be missed, must indicate who or how classes will be covered.
- ____ 5. **Personal or Rental Car:** If you are traveling more than approximately 70 miles, you are encouraged to use a rental car. If you choose to drive a personal car, you will only be reimbursed the cost of a rental, if it is less expensive than personal car. (Enterprise can pick you up. You can also leave your personal car at Enterprise, if you wish)

AFTER TRAVELING: In order to allow time to process your travel paperwork, turn in your paperwork as ASAP after your return. Travel Expense reports **MUST** be submitted to the Business Office, by the department staff, with all required documentation within **30 Calendar days** from your return ...no exceptions!

- ____ 6. Things you will need to complete after you return from the trip:
 - a) Inform staff of the time of departure and time of arrival home (door to door)
 - b) Submit any literature from or about the trip that supports why the trip was taken.
 - c) **ORIGINAL** hotel receipt showing lodging **paid in full**. You must have your hotel receipt in order to get meals per diem. (*Reminder-If New York State hotel, must provide tax exempt form to the hotel*)
 - d) Any **ORIGINAL** receipts that you would like to be reimbursed for must show proof of purchase. All meal and taxi receipts must be itemized with a **maximum of 20% gratuity**. Also, the state will not reimburse for tax.
 - e) If you pay with your own credit card, **and it is a Visa**, we will also need a copy of your card statement or a copy of the front of the card. (We can talk about what you can blackout for privacy)
 - f) If mileage is being reimbursed, you must sign “Statement of Automobile Travel” form (AC 160). Reimbursement can be for mileage or gas, **NOT both**.
- ____ 7. A Travel Voucher will be completed in the department office for you and the Chair to sign.

*** Your reimbursement amount will be Direct Deposited into the account you have set up for your paycheck deposit.**

REMINDER: The Office of the State Comptroller sets rules and regulations for reimbursement of expenses incurred while traveling on official state business
Look at: <https://www.osc.state.ny.us/agencies/travel/manual.pdf>

For more information, visit the BU Travel website at: <http://www2.binghamton.edu/travel/travel.html>