

UK COLLEGE OF NURSING TRAVEL REQUEST

DATE OF REQUEST: \_\_\_\_\_ VOUCHER #: \_\_\_\_\_  
(issued by CON Business office upon approval)

NAME: \_\_\_\_\_

TRAVEL DATES REQUESTED: \_\_\_\_\_ to \_\_\_\_\_

TITLE OF WORKSHOP, CONFERENCE, OTHER: \_\_\_\_\_

\_\_\_\_\_

LOCATION OF CONFERENCE: \_\_\_\_\_

\_\_\_\_\_

EMERGENCY CONTACT NAME AND PHONE WHILE TRAVELING: \_\_\_\_\_

\_\_\_\_\_

PURPOSE OF TRAVEL:

- Presentation
- Faculty/Professional Development
- Recruitment
- Other \_\_\_\_\_
- College of Representative
- Travel to Clinical Site/Student Evaluation
- Visiting Professor

PROPOSED OUTCOME TO COLLEGE:

- Presentation
- Publication
- Other \_\_\_\_\_
- Grant Application
- Development of teaching materials

TRAVEL INFORMATION:  In-State Travel  Out-of-State Travel

FUNDS COVERING THIS TRIP:  Grant Funds/Account #: \_\_\_\_\_  
 College Funds (assigned by Dean's Office)

*Itemize Anticipated Expenses below: (see back of form for more information)*  
**\*PLEASE INDICATE IF YOU WANT AIRFARE & REGISTRATION FEE PRE-PAID\***

MODE OF TRAVEL: \_\_\_\_\_ Pre-Pay Airline Ticket  Yes  No  
(car, plane, etc.)

COST OF TRAVEL: \_\_\_\_\_  
(mileage, airfare, etc.)

REGISTRATION FEE: \_\_\_\_\_ Pre-Pay Registration Fee:  Yes  No

HOTEL: \_\_\_\_\_ MEALS(Per diem): \_\_\_\_\_ TIPS: \_\_\_\_\_ TAXI/BUS/SHUTTLE: \_\_\_\_\_

TOTAL ANTICIPATED COST OF TRIP: \_\_\_\_\_ AMOUNT APPROVED: \_\_\_\_\_  
(10% over approved amount will be paid to traveler if cost estimate is underestimated after traveling)

REPORTING ADMINISTRATOR APPROVAL: \_\_\_\_\_ DATE: \_\_\_\_\_

BUSINESS OFFICE APPROVAL: \_\_\_\_\_ DATE: \_\_\_\_\_

OFFICE USE ONLY:	
Personnel:	_____
Traveler:	_____
Rep Admin:	_____

### Travel Reimbursement Hints:

Mileage for a privately-owned vehicle shall be 48.5 cent per mile, and payment shall not exceed the cost of airplane coach fare. A cost comparison must be submitted with the out of state mileage expenses. No reimbursement may be paid for travel between home and workstation.

A maximum of \$12.00 per night for parking shall be reimbursed. A receipt for this is needed.

Actual and necessary expenses for official business travel shall be reimbursed upon submission of receipts for items over \$10.00 dollars.

### Reimbursement for Meals:

Travel within the Domestic United States will be reimbursed based upon per diem rates established by the U.S. Department of Treasury as stated in Internal Revenue Service Publication 1542.

Please note that if you are traveling "In-State" and you do not have overnight lodging, breakfast and lunch will not be covered, however if you are out past 9:00 pm you may claim dinner only. If the in-state travel does include overnight accommodations, the University will reimburse food according to the hours set forth below. You must be in travel status the entire time frame for each meal.

Breakfast 6:30 am – 9:00 am    Lunch 11:00 am – 2:00 pm    Dinner 5:00 pm – 9:00 pm

Travel status begins when the employee leaves home or their workstation to begin the trip. Travel status ends when the employee arrives home or their workstation.

For further information or clarification regarding Travel Reimbursement please contact the business office or go on line to UK Business Procedures Manual E-5-1 at [www.uky.edu/Regs/BPM](http://www.uky.edu/Regs/BPM).

### PROCESSING OF TRAVEL REQUESTS

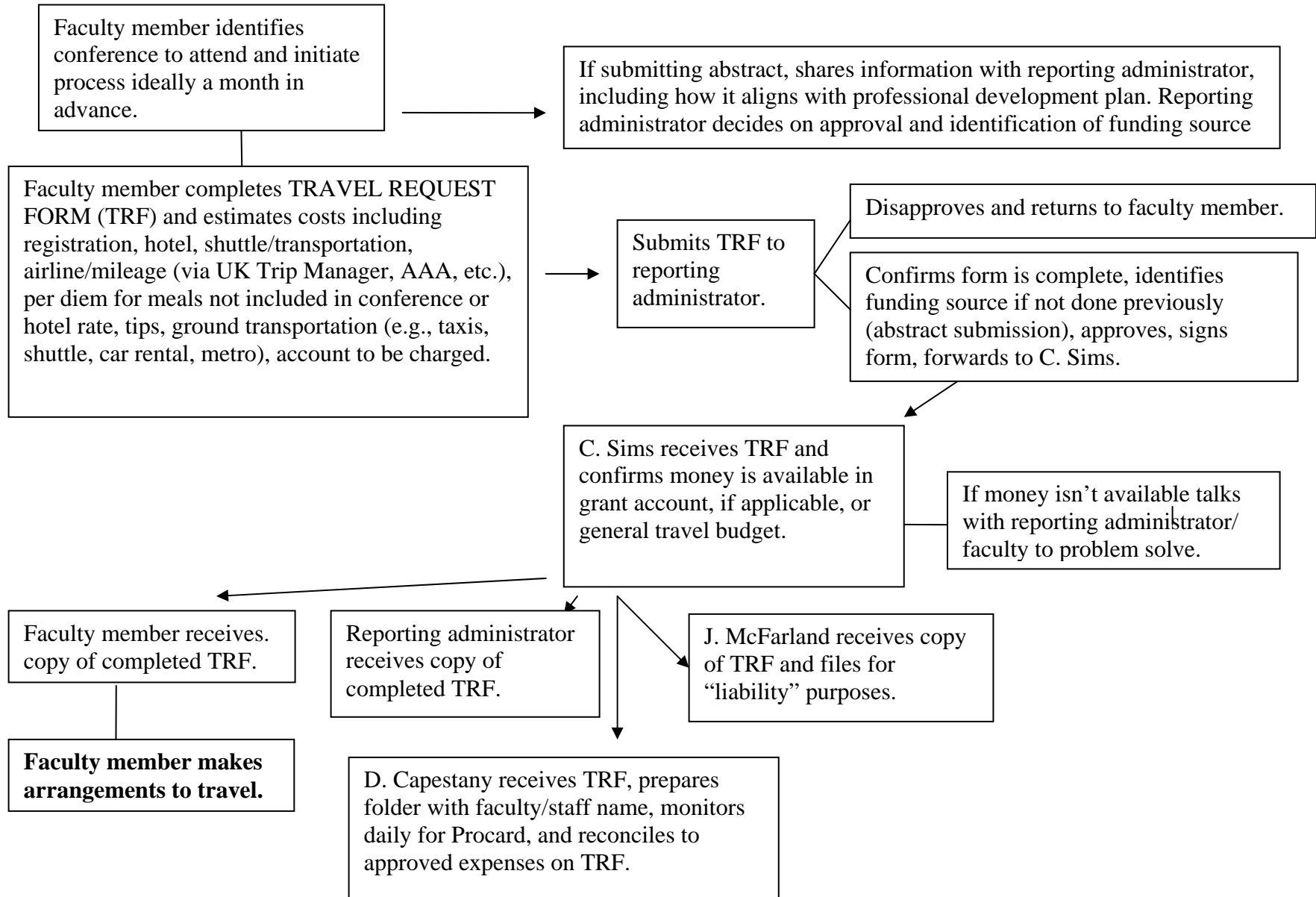
- Fill out attached form and submit to your Reporting Administrator. Once approved, the form will be forwarded to the Carolyn Sims for processing. You will receive a copy back of the approved request with the approved amount.

Upon return from the trip a travel voucher form and accompanying receipts should be turned in to Donna Capestany. Reimbursement checks are usually received within 12-14 working days.

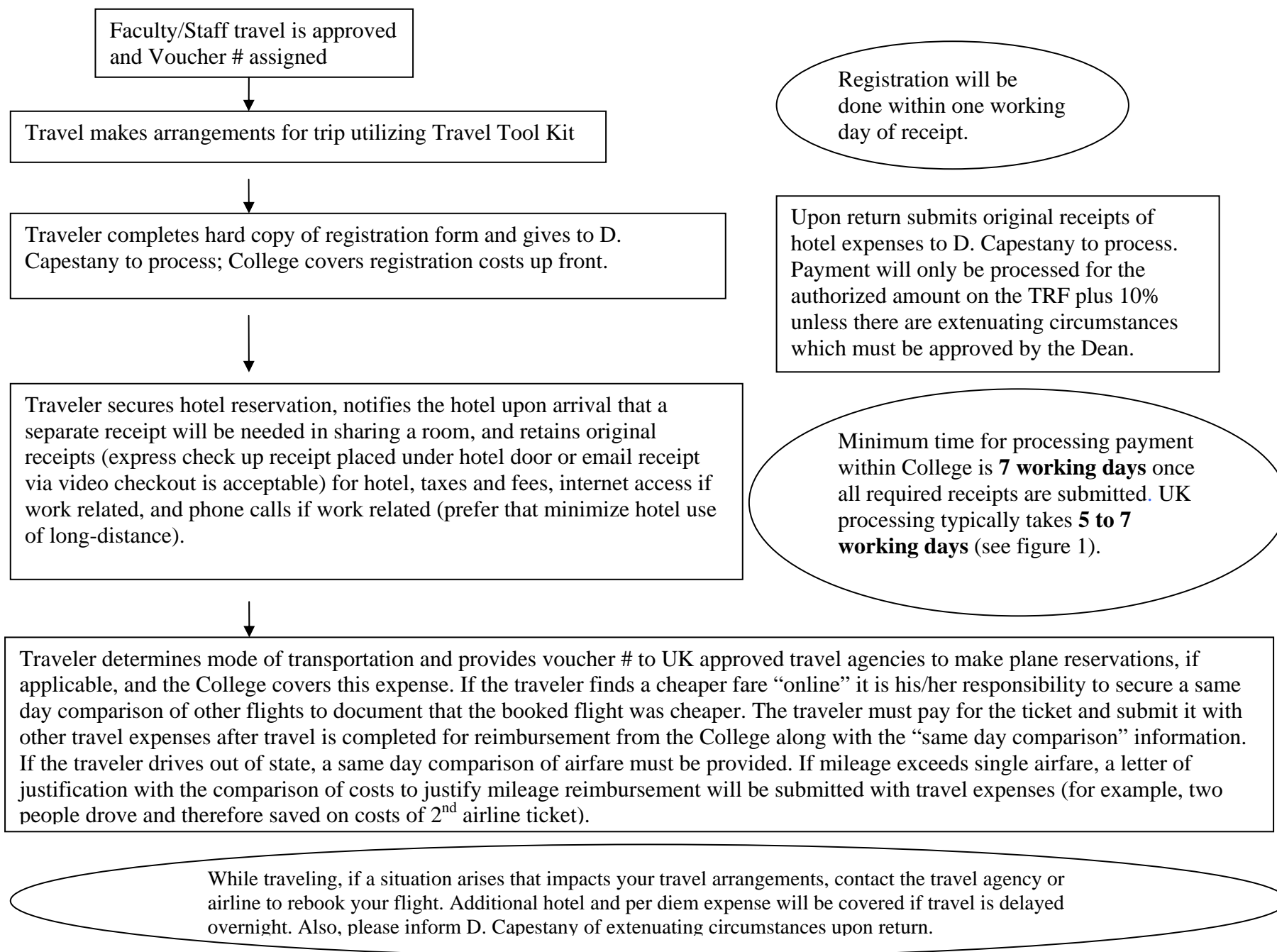
#### **PLEASE REMEMBER:**

- Travel requests must be approved and processed **PRIOR** to the trip being taken.
- **Please estimate travel costs as close to actual cost as possible.**
- If you intend to rent a car while on your trip, this rental **MUST** be justified and approved at the time the Travel Request is made prior to the trip. If for some reason this is not done, we cannot guarantee that the costs of the rental car will be reimbursed.
- Timely submission of travel vouchers upon return of the trip is encouraged. Travel Vouchers may be obtained from the business office and should be returned to the business office upon completion. All original receipts must accompany the Travel Voucher.
- In-State Travel Vouchers should cover no more than **three (3) months** worth of expenses at one time. In-State Travel Vouchers may be submitted monthly if expenses are more than \$10.00.

## University of Kentucky College of Nursing - TRAVEL PROCESS



## FACULTY TRAVEL IS APPROVED



## Figure 1. Approval Steps and Timeline for Reimbursement

1. Faculty/staff member who traveled provides all necessary documentation to D. Capestany; D. Capestany processes paperwork in order received
2. Within 3 working days, D. Capestany determines which expenses are allowable and prepares Travel Expense Voucher (TEV) and emails faculty/staff member that his/her signature is needed to approve amount reimbursed and to continue the process. If a faculty member has assigned “signature authority” to someone else s/he must notify D. Capestany in order that she can email the correct person that the TEV is ready for signature.
3. Within 2 working days, signed TEV is reviewed by K. Minton or C. Sims for final approval and it is returned to D. Capestany
4. TEV is mailed to UK Accounts Payable, may take up to 3 working days to arrive
5. UK Accounts Payable reviews TEV within 2 working days for travel within the United States and within 4 working days for international travel. This timetable is reasonable only if the TEV does not have issues, problems or errors to be resolved. Once TEV is approved, check is mailed to campus address on the next working day, may take up to 3 working days for check to arrive
6. When check arrives in College, D. Capestany emails faculty/staff member within 1 working day that check is available

University of Kentucky  
College of Nursing  
**TOOL KIT FOR TRAVEL**

**Follow these guidelines for travel request and reimbursement process.**

**Websites you will want to visit:**

<http://www.uky.edu/Travel/tripmanager.html> (for all travel questions)

<http://www.uky.edu/Regs/BPM> (for travel regulations)

<http://www.uky.edu/EVPFA/Controller/aphome/aptrvl.html> (for international and out-of state travel per diem)

1. Each traveler should visit [www.uky.edu/Travel/aaa](http://www.uky.edu/Travel/aaa) to set up your profile; this will reduce having the “repeat” basic information every time you travel through AAA.
2. You receive an invitation to attend or an announcement of a conference you would like to attend.
  - a. Do not make your arrangements or register just yet!
  - b. First, you obtain and completely fill out the travel request form. Be sure you have the most recent form that can be obtained on the College’s website under resources (<http://www.mc.uky.edu/Nursing/resources>). Follow the instructions below for correctly completing the travel request form
    - i. *Title of workshop, conference, other:* Please do not use abbreviations (e.g., AAHFA, NIH, AHA). Using the complete names/titles will speed the process up, and prevent a phone call to you asking for clarification.
    - ii. *Emergency contact name and phone while traveling:* Provide the name and phone number of the individual who will know how to reach you in case of an emergency. This information will not be widely shared but will assist us in the case that we need to reach you on short notice.
    - iii. *Travel funds:* The reporting administrator provides the source of travel funds as part of the approval process.
    - iv. *Mode of travel*
      1. *Airfare:* Check with a UK approved travel agent (AAA – 859-323-5354, Avant Travel – 859-233-0000 and Commonwealth Travel/The Travel Authority – 859-277-7135) or other online site to estimate the cost of airfare.
      2. *Ground Transportation:* Estimate the cost of taxi’s, buses, shuttles and metro system fees to go to and from the airport and to and from your meeting site.
        - a. Auto rental in lieu of other ordinary transportation will be allowed only with acceptable justification. Insurance for collision or comprehensive damage waiver-deductible on rental vehicles is covered by the University’s Actual Cash Value Comprehensive & Collision coverage plan and therefore is neither an authorized nor reimbursable travel expense. (Other insurance, including liability

or casualty insurance, is a personal expense.) The cost of renting cars or other special conveyances in lieu of ordinary transportation shall be allowed if written justification from the traveler to the reporting administrator who will be responsible for revising and approving. The approved justification must be submitted with the travel request form.

3. *Hotel:* Provide an estimate based on the full cost (including taxes and other fees) of the room for of the hotel.
  4. *Per diem:* You need to determine the per diem that is allowed for the travel location. You can do this by going to [www.uky.edu/Regs/BPM/](http://www.uky.edu/Regs/BPM/) (go to E-5-18) and looking up the city. For example, in Yuma Arizona the per diem rate is \$39.00 per day while the rate in Phoenix is \$49.00. You are reimbursed based on the time of day you leave and the time of day you return. To be reimbursed for the meals (breakfast, lunch and dinner) you must be in travel status the entire time frame designated for each meal. See travel request form or web site mentioned above. Tips are included in the per diem amounts.
  - v. *Total anticipated cost of the trip:* This is critical in that you will be reimbursed only the amount you anticipate and only up to 10% more unless there are extenuating circumstances.
3. Ideally, the travel request forms should be turned in at least one month prior to your travel date, in order to obtain the necessary approvals and to get the best rates.
  4. Once you have completed the travel request form:
    - a. Turn it in to the person to whom you report (or the person funding your travel). The form may be given back to you if it is not entirely or correctly completed, slowing up the process. Allow up to 3 working days for this initial approval. If your direct report is out of town for an extended period please forward your request to the Dean for approval. The reporting administrator forwards the approved travel request form to Carolyn Sims for processing.
    - b. After administrative approval, typically within 2 working days, the travel request form is returned to you with a voucher#. A manila envelope will be provided for you. This envelope has travel reimbursement information on it and is handy to keep all your receipts in until you turn them in to Donna Capestany.
    - c. Note - the form will be given back to you prior to approval if it is not entirely and correctly completed. Arrangements for traveling should not be made before approval is received for the trip.
  5. NOW that you have your travel approved, you are able to make your travel arrangements.
    - a. Hotel Room: You will be reimbursed for single occupancy. If you are bringing a family member or friend who is staying in the room with you, you must provide documentation of the single and double rate and pay any extra charges. For example, if the rate for single occupancy is \$250.00/night and the rate for double occupancy is \$260.00/night, you must pay the extra \$10.00/night. Additionally, if you have a family member/friend staying with you, you will need to obtain proof of the room rate for each occupant from the hotel in the form of a brochure or a letter. It is strongly advisable to obtain this when you are

- checking in. You will want to include a brief note of explanation with your receipts when you turn them in for processing.
- b. Airfare: Can be “prepaid” – it is best to make arrangements with the UK approved agencies AAA – 859-323-5354, Avant Travel – 859-233-0000 and Commonwealth Travel/The Travel Authority – 859-277-7135. In order for UK Travel to book your airfare you will need to give them the Voucher # (highlighted on approved travel request form). Note: fares change, and you are required to obtain approval for your travel prior to making any arrangements. Although you are asked to obtain the least expensive fare, this does not mean that you must travel at inconvenient hours (for example, take a night flight) or make multiple connections to save money. **IMPORTANT:** If you make your own arrangements and pay for them in advance, you must provide documentation that there was no cheaper fare available from an approved UK travel agent or UK Trip Manager. If you do not provide the comparison, you will not be reimbursed. This cost comparison **MUST** be done on the same day that you purchase your ticket.
  - c. If the traveler drives, the Administrative Rules specify that the cheapest form of travel will be reimbursed. A cost comparison from UK Trip manager must be submitted with the out of state mileage expenses.
6. After the trip – turning in the reimbursement packet.
- a. You must turn in to Donna Capestany originals of all receipts (make copies for yourself) in the manila envelope. “Originals” of hotel receipts mean: an emailed bill, video check out bill or fax from the hotel of your bill. Please check your bill for erroneous charges, ideally prior to checking out of the hotel. Please circle any charges that are personal and not appropriate for reimbursement (e.g., alcoholic beverages, food from the mini bar, movie rentals).
7. When to expect reimbursement:
- a. Typically in 12-14 working days from the time you gave your completed packet with all of the appropriate documentation to Donna. This time table is reasonable only if the expense voucher does not have issues, problems or errors.
    - i. Remember – your signature is required prior to submission of the approved reimbursement to UK Accounts Payable. Donna Capestany will email you when the form is ready for your signature.
  - b. Donna Capestany (323-6535) will email you when your check arrives in the College. We do not put checks in faculty/staff mailboxes due to security issues

Check the UK Business Procedures Manual for more information regarding travel. This step also accelerates the process if you research this manual for any information you do not have. You may find this manual on the UK homepage [www.uky.edu/Regs/BPM](http://www.uky.edu/Regs/BPM) (see E-5-1).

j-414 8/30/07