

*The more information supplied to the Travel Staff, the more expeditiously your reimbursement will be processed.*

MAJOR CHANGES:

1. **One Form:** You now only have ONE form replacing the previous travel request form and any separate expense report forms.
2. **Automatic Consecutive Dating:** When you add the destination and return dates, the form is programmed to automatically “fill in” the consecutive dates in the following sections: Day by Day Itemization, Lodging, and Meals. If your travel exceeds 6 days, they will be placed on “Page Two” which is the same format minus the general information at the top of the form.
3. **Advance Amount:** The amount of your requested “Advance”, if applicable, must be broken down into airfare, registration, and/or per diem.
4. **Direct Bill Items:** If the item was directly billed, please note this in either the date or details section under the appropriate heading (i.e. airfare, rental car).
5. **Texas Mileage Guide Website:** There is now a direct link on the form to determine mileage if you use your personal vehicle. **If you choose to**, you can determine the mileage yourself. You **MUST** print the report from the website and attach with your Expense Report Package. If you choose not to, the travel staff will continue to calculate the mileage as well as double check the reports provided by the traveler.
6. **Lodging Changes:** In the line by line itemization, please list the **room rate per night**. There is now a line explicitly for the hotel tax amount. Remember: If in-state hotel, a Texas Hotel Occupancy Tax Exemption Certificate must be completed as you will NOT be reimbursed for the state tax. If you fail to have this form completed and are charged the tax, you will be personally responsible for that expense. For your convenience, a copy of the form may be found on our department’s intranet site. You can also access this form on EPIK, by going to “Researcher Portal”, “Travel” tab at top, the “Travel Forms” at bottom right.
7. **Calculation:** It automatically calculates the amounts placed in the “Amount” column including those that roll onto page two. It also subtracts any “Advance Amount”.
8. **Original Receipts:** Please do not **write, staple, highlight or tape** the original receipts. The TEES auditors are very specific on this matter. If you need to make a special note for a specific receipt, you can identify this in the note section at that bottom of page one. If you need to reference a specific receipt and feel naming it in the note section is not sufficient, then you can number the receipt using a pencil in the top corner (Making sure not to write over any information) and use that same number in the note section referencing the explanation for that receipt. For example, the note section will reference receipt (1) and that receipt will have a small (1) in the corner written in pencil. This can be compared to a foot note used in a word a document. If you need further explanation, please ask.
9. **Page Two:** There is a page two if your travel is longer than 6 days.
10. **Require Receipts:** The items that require receipts are noted with an asterisk (\*) on the form. Please turn in the original receipts in the manila envelope I will provide. This is to make sure original receipts are not misplaced.

Here are the details:

<b>Before you leave:</b>	
Name	Traveler's Name
Destination	City, State, Country
Departure/Return Date and Time	Dates/Time you depart and return to College Station which will automatically fill in consecutive dates as stated above *** <i>Note: If your travel dates change from your original form, please notify Teresa as soon as possible. Your travel request must be revised before your reimbursement can be processed.</i>
Purpose	Reason for Trip
Benefit	How TEES/PROJECT will benefit from the travel. There is a drop down bar to provide options. If you choose "other", please explain in the note section at the bottom of the page.
Mode of Transportation	Click on appropriate boxes of all travel used for this trip
Travel Request #	Will be filled in by the MEEN Travel staff
Accompany	If you are traveling with someone
Accompanied by	If someone is traveling with you
Estimated Expense	Projected amount, estimate on the high side, if guessing. Also, estimate should ONLY include those items <b>NOT being directly billed.</b>
Project (s) Charged	List all projects/accounts that will be charged for the travel expenses
Advance Amount	Broken down into airfare, registration, and/or per diem
<b>As you travel, when you return...</b>	
Day by Day Itemization	This section is to be used to detail how you traveled (i.e. personal auto, rental, plane) and what you did (i.e. assessment, meeting, conference).
Expenses	Please note in the date section if items were direct billed
Transportation	Assign the date, then you can simply click on the appropriate box to select form of travel and fill in amount
Gas	Date and amount
Own Car	Texas Mileage Guide website (click on the link on the form) can be used to determine amount
Lodging	Per night cost of the room ( <i>taxes go in the next box</i> )
Hotel Tax	Total amount of hotel tax. If in-state hotel, a Texas Hotel Occupancy Tax Exemption Certificate must be completed as you will NOT be reimbursed for the state tax. If you fail to have this form completed and are charged the tax, you will be personally responsible for that expense. For your convenience, a copy of this form can be found on the department's intranet site. You can also access this form on EPIK, by going to "Researcher Portal", "Travel" tab at top, the "Travel Forms" at bottom right.

Meals	Day by day total amount of meals. You can denote breakfast, lunch, and/or dinner in the details section. <i>Note: Meal reimbursement is for actual expenses up to the maximum allowance per location.</i>
Conference Fees	List conference fees (requires receipt)
Misc. Expenses	Use if needed and provide purpose. For example, books, tools, internet access, or batteries for equipment.
Totals	Automatic sum of subtotals from pages one and two. The amount of any advance is automatically subtracted from the subtotals.
Signature and date	You must sign and date the form
Notes	This section can be used for any additional notations, specifically, "Other" information for the Benefit section and necessary documentation/information for specific receipts.
Page Two	If your trip is longer than 6 days, page two may be used for additional expenses.

***Please contact Teresa Phillips with any questions.***

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