

REQUEST TO TRAVEL PROCEDURES (F3.32)

All Lamar University employees and prospective employees are reimbursed via Travel documents.

A “Request to Travel” form *must* be completed, signed by all required parties with original signatures, and forwarded to the travel department **BEFORE** a Lamar University business trip may be arranged. (See **“Appendix I” for a copy of the form**). The account manager should verify there are sufficient funds in their travel pool budget (71000) when approving the request.

The travel coordinator will encumber the requested amount and this encumbrance will signify that the trip has been granted final approval. A traveler may verify the entry of the encumbrance by looking at their Index and account code 711111 (Travel Encumbrances) via Banner Self Service. Also, the travel coordinator will return a copy of the encumbered request to the traveler.

If the travel coordinator determines there is insufficient budget when encumbering, the Request-to-Travel form will be stamped “Insufficient Budget” and returned to the traveler.

Please Note: Travel expenses will not be considered reimbursable until the travel coordinator has encumbered the request.

If the traveler is requesting a cash advance, the Dean/Division Administrator must initial the Cash Advance “Approved By” section.

If the traveler is traveling to a foreign country, a “International Travel Release” form, the “ITAR” form, and a daily itinerary must accompany the “Request to Travel” form. The International Travel Release form and the ITAR form may be found on the Lamar University Travel website.

If the traveler is using state appropriated funds and is traveling to Washington, DC to “confer on legislative or appropriations issues with U.S. Congress/Federal Government, Staff or Officials”; a “Report of State Agency to Travel to Washington, DC” (located on the Texas Office of State-Federal Relations (OSFR) website must be attached (<http://www.osfr.state.tx.us/travelform.asp>). Print out the page before you hit enter or submit and attach copy to request to travel.

The following information must be entered onto the “Request to Travel” (see the “Appendix II” section of this Guide for examples of different types of travel).

- ❖ Name, Banner Identification Number and Employee’s Position
- ❖ Department Name and Department PO Box
- ❖ Date(s) of Travel, Destination and Purpose of Travel
- ❖ Banner Index Number
- ❖ Account / Description / Approximate Expense

[Please make sure you complete the proper TX (In-State) or Non-TX (Out-of-State) section. If your trip’s destination is Out-of-State, all expenses related to that trip will be considered Non-TX (Out-of-State). Also, miscellaneous and incidentals are the same]. Please approximate the requested expenses as closely as possible.

- ❖ Any travel charges being paid with a Purchase Order, such as airline tickets or registration fees, should **not** be entered onto the Request to Travel, as this would result in a double encumbrance of expenses.
- ❖ **IF** you are requesting a cash advance, you **MUST** enter the cash advance amount on the line provided. Cash Advances are for Athletic team travel, foreign travel and student meal money only (special circumstances will be taken into consideration). The cash advance “Approved by” section **MUST** have the Dean’s / Division Administrator’s Initials. *Remember, a cash advance may not include monies for “mileage”. A cash advance is just that...an advance **BEFORE** you leave to go on your trip. Also, a cash advance may not be given to an employee with a Lamar University CitiBank Travel Credit Card. Please see the Travel Advance Policy and Procedures section for more information.*
- ❖ **IF** traveling out-of-country, please see the section in this Travel Guide titled, “Foreign Travel Policy and Procedures”.

***Please note: If an employee is traveling on a Lamar University sanctioned trip, but no University funds will be utilized for the travel expenses, a Request to Travel form must be completed and sent to the Travel/Finance department. The document will be put in the employee’s travel file. This provides a written, approved record of the trip.