

## REQUEST TO TRAVEL PROCEDURES (F3.32)

All travel conducted by a Lamar University employee on behalf of the university, must submit a completed and approved “Request-to-Travel” form to the university Travel office **BEFORE** arrangements are made for the trip. This form may be found on the Lamar University Travel website <https://www.lamar.edu/finance-and-operations/financial-services/procurement-and-payment-services/travel.html>). This allows for documented proof that the trip has been approved by all necessary parties. Please note, departments are not required to submit a Request-to-Travel for *Prospective Employees*.

### Travel Where No Reimbursement is Requested or Allowed

A completed and approved Request-to-Travel form is required for travel where no reimbursement will be requested, as well as a request with local mileage which is non-reimbursable. Travel is considered “local” when there will be no overnight stay and the trip is within a 50-mile radius of the university.

If, in the course of normal duties, an employee must travel “locally”, that employee may now submit one Request-to-Travel form covering all of their “local” travel trips. This may be submitted per semester or fiscal year; whichever is deemed appropriate by their department. With this policy, the department must have on file documentation containing approval of each travel occurrence and the specifics of the travel i.e. date, time, location, purpose etc. This documentation must be readily available to review for audit purposes.

### Travel Where Reimbursement is Requested

For trips where the traveler will be requesting reimbursement of expenses, the Index account manager must first verify there are sufficient funds in their travel pool budget (710000) when approving the Request-to-Travel. Once the completed Request-to-Travel form has all appropriate signature approvals, the form is to be submitted to the Travel Accountant. The travel accountant 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 accountant will return a copy of the encumbered request to the traveler.

If the travel accountant 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 accountant has encumbered the request.**

If the traveler is requesting a cash advance, the Dean/Division Administrator **must initial** the Cash Advance “Approved By” section. Travel Cash Advances will only be issued for a trip involving Lamar University students, teams/sports or international travel. Please see the Lamar University Travel website for “Travel Advance Policy and Procedures”.

If the traveler is traveling to a foreign country, an “International Travel Release” form, an Export License Exemption for Temporary Exports for LU owned property (the TMP form), and a daily itinerary must accompany the “Request to Travel” form. The International Travel Release form and the TMP 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 “Completed Form Examples” on the Lamar University Travel website 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 NonTX (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” ( <https://www.lamar.edu/files/documents/finance-operations/administrative-services/travel/10-foreign-travel-policy-09-09-20.pdf>).

\*\*\*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 department. The document will be put in the employee’s travel file. This provides a written, approved record of the trip.