

Completing the Travel Exhibit J

NORTHERN ARIZONA UNIVERSITY TRAVEL EXPENSE SUMMARY		Exhibit J		TA #	Expense Report #		Page 1
				Cash Advance #			
Prepared By: Kate Florman	Date: 4/2/2019	Traveler: Maria Saurer	Emplid #: 1074157			State Vehicle	X
Entered By:	Date:	Speedchart: 5470005F25	Project:	Phone: 928-523-6903	Rental Vehicle		
Purpose of Travel/Description: Shared Services in Higher Ed Conference	Destination: Phoenix, Arizona	County: Maricopa		Personal Vehicle			
Traveler's Home Address: 1245 S. Birch Street, Flagstaff, AZ	Traveler Duty Post: Flagstaff Mountain Campus	Comments:			ATC Completed?	X	

Please reference the [Travel Booking Guide](#) for specific policy information.

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- I. **Exhibit J Header:** The sections highlighted in **green** must be completed for every Exhibit J that is submitted:
 - **Prepared By** = who completed the Exhibit J
 - **Date** = when the Exhibit J was completed
 - **Traveler** = who went on the trip?
 - **Emplid #** = the traveler's Employee ID number
 - **Speedchart*** = the speedchart funding the travel, example: **5470005F25**
 - **Project*** = the grant account funding the travel (as applicable), example: **G1000234**
 - **Phone** = the traveler's work phone number
 - **Purpose of Travel/Description** = what was this travel for?
 - Conferences: *Conference Name; Location* (ex. NODA Conference; Pomona, CA)
 - Recruitment trips (high school visits, college fairs, etc.): *Recruitment; Location* (ex. Recruitment; Tucson, AZ)
 - Please be consistent in how you describe your travel purpose from trip to trip.
 - **Destination** = the city/cities the traveler will be visiting and state, example: *Phoenix, AZ*
 - **County** = the county/counties the traveler will be visiting, example: *Maricopa*
 - **Traveler's Home Address** = the physical street address of the traveler
 - **Traveler Duty Post** = what campus or location is the traveler's office located, example: *Flagstaff Mountain Campus*
 - **State Vehicle, Rental Vehicle, Personal Vehicle** = Place an "X" to note which type of vehicle the traveler used, if traveler drove while in business travel status.
 - **ATC Completed?** = Place an "X" to note traveler has completed the Annual Travel Certification (ATC). Must be renewed every fiscal year and completed **prior** to traveling, or traveler is not eligible for reimbursement.
 - The sections highlighted in **blue (Comments)** are not required but can be helpful when processing an Exhibit J.

***NOTE:** The **Speedchart** and/or **Project** will be the speedchart information for the department/program that is **funding** the travel. It may be different than the traveler's actual department.

[illegible]

II. Travel Expense Summary:

Exceptions to Policy	
Lodging:	
Transportation:	
Cash Advance:	
Multiple Rep (pg. 3)	
Other (specify)	
continue any additional details on Summary	

Exception to Policy Signature:	Date:
I certify that all exceptions to the travel policy are appropriate, reasonable, and appear to be for a valid university purpose and that all supporting documentation is attached with this claim.	

- III. **Exceptions to Policy:** Should be requested AND approved, via email, ***prior to incurring an expense!!*** The list of Travel Exception to Policy Signers is maintained through the Comptroller's office and can be found [here](#); and the relevant policy and the link for the Exception to Policy Signer Authorization form can be found [here](#).
- Note approved Exceptions on the Exhibit J in the section titled **Exceptions to Policy**, and attach the approval email as part of the backup documentation included with the Exhibit J.

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- IV. **Documentation Check Boxes** (top left): Use the provided box as a reminder for required travel related documentation to submit with the Exhibit J.
- Place an "X" in the Attached column for each type of document you include.
 - As a reminder, all travel related documentation – emails, receipts, etc. should be included with the Exhibit J. Do not limit your attachments to only what is listed in this section.
- V. **Personal Vehicle Mileage Reimbursement** (center top): Mileage reimbursement must be pre-approved, in writing, by your direct supervisor. Your college or division may also require additional approval from your Chair/Director, AVP/Dean and/or Provost/VP ***prior*** to the trip – no pre-approval, no reimbursement!
- We reimburses mileage only, via Google Map. Print out from departure address to destination address required – the overall mileage will be double for round-trip calculation. Include the Google Map printout as part of the backup documentation submitted with the Exhibit J.
 - Enter total round trip miles in the first box in the *Map* column.
 - Enter commute times to/from duty post in the box on the very bottom of same table.
 - If traveler is leaving from their home, commute miles from/to their duty post must be subtracted from the overall distance, if travel is in the same direction.

VI. The **Additional Details** section of the Summary Page (page of the EJ) is for explaining, in detail, the charges documented on the first page of the Exhibit J.

- This is also where the traveler will explain/justify any Exceptions to Policies and/or changes that occurred during the trip - unusually long travel times, unexpected additional expenses, major changes to travel after initial trip approval, etc.

ADDITIONAL DETAILS:

Use this space for additional justification, notes, or descriptions as necessary. Include disclosure of any third party payments or reimbursements.

Lodging:

(2) nights at the Spring Hill Suites in Downtown Phoenix. Paid on Kate Florman's Pcard.

Conference hotel room block was full. The Spring Hill Suites was on the Conference's list of over-flow hotels (see attached).

TOTAL: \$401.93

Meals:

No meals were provided by the conference. The hotel provided a very nice breakfast both mornings.

Claimed (2) lunches & (2) dinners.

TOTAL: \$65.87

Transporation:

Used department fleet vehicle & university provided gas card.

Parking at hotel - \$6/day, traveler paid cash out-of-pocket.

TOTAL: \$12.00

Registration:

Conference registration for (2) days, paid on Kate Florman's Pcard.

TOTAL: \$650.00

NOTE:

There was an accident at the Camp Verde exit on I-17 northbound on traveler's return trip home, and the freeway was closed for two hours.

Traveler was unable to exit the freeway to take an alternate route home, which is why the total return trip took (3) hours. Traveler's supervisor was text messaged and notified of the delay.

No additional expenses were incurred.