

# NAU Travel Booking Guide

The Travel Booking Guide is a resource for NAU travelers and Travel Specialists when seeking travel authorization for, booking, and processing travel documentation post-trip. Please be aware that this guide works in conjunction with Arizona State and NAU Travel policy.

## Annual Travel Certification (ATC) & Authorized Driver Verification: [\(TRV 515-06\)](#)

To be completed annually, July 1. Effective July 1, 2018. <https://nau.edu/Comptroller/Travel/Forms/>

- No ATC prior to travel? Traveler will not receive *ANY* travel reimbursement!
- Authorized Driver - must be completed **prior** to using a NAU fleet vehicle, renting a vehicle via PCard, or for reimbursement of any personal vehicle expenses – no matter what! Renewal every 4 years. [\(TRV 525-02\)](#)
- If traveler will be renting a car from an outside vendor, including if NAU Fleet Services rents that car on their behalf, or using their personal vehicle on university business, traveler must have personal liability insurance.
- NAU students must complete an ATC if going on *university business* and/or if receiving a reimbursement. Field trips are excluded, field trips are considered class curriculum.

## Pre-Travel Authorizations:

- All NAU business travel must be pre-authorized by supervisor and/or department leadership **prior** to registering for event and/or booking accommodations and travel. [\(TRV 510-01\)](#)
- The following will require *prior* authorization:
  - Personal Vehicle use for travel
  - Adding personal time to a trip
  - More than (2) individuals from the same department attending an event, in **or** out-of-state.
- “Day-Trip” travel for conference/workshop attendance, needs to be pre-authorized.

## Booking Travel & Submitting Documentation Timelines:

- Using Travel Sites – Expedia, Kayak, Orbitz, etc.: A great resource for comparison shopping rates, services and locations. It is recommended that all travel be booked directly from the vendor’s (hotel/airlines) specific site, **not** a travel site.
- Submitting documents to department Travel Specialist should be submitted within 5 business days after return from travel
- Travel should be booked to best fit NAU’s business need, **not** the traveler’s preference. [\(TRV 515-05\)](#)
- If travel arrangements are deemed inappropriate for the business need, travel request may be denied and/or traveler may be required to compensate NAU for any extraneous expenses, or not receive reimbursement for those expenses. [\(TRV 515-05\)](#)
- If there are travel delays due to weather, accidents, unusually heavy traffic, detours, etc. – be sure to note them on the Exhibit J, page 2 – Additional Details. Any out-of-pocket expenses incurred as a result of the delay(s) may be reimbursable. [\(TRV 560-04\)](#)

**Payment Methods:** [\(TRV 515-08\)](#)

- Whenever practical, a University sponsored payment method (PCard or PO) should be used to pay for conference, lodging, common carrier travel, etc.
- If a personal payment method is used, the traveler will not be reimbursed until after the completion of the travel-related event.

**Event Registration:**

- Plan accordingly and utilize “early bird” registration dates.
- Attach a copy of the event registration AND the whole, complete agenda (all pages!). [\(TRV 515-04\)](#)
- If a membership fee is paid separate from the event registration, but it allows for a discounted rate, it is ok to pay. Do not include with the registration confirmation, as it is not considered a travel expense. Approval for purchase of membership will be addressed on a case-by-case basis.
- Optional registration fees, such as recreational or social activities, are not reimbursable and are to be paid out-of-pocket. [\(TRV 560-05\)](#)

**Accommodations/Hotel:** [\(TRV 535-01\)](#)

- When attending a conference or an organized event, often special accommodations or room rates will be available. Utilize those resources FIRST! Book via the provided reservation phone number or specified website before doing your own web search. If the room block fills, call the hotel directly and ask if they will honor the specified group rate.
- If a traveler plans on staying at a conference hotel or a conference over-flow hotel, they do **NOT** need an exception to policy signature. [\(TRV 535-03\)](#) Include conference hotel status on page 2 of Exhibit J, notes section. Reimbursement for lodging while attending a conference shall not exceed the least expensive single occupancy room rate published in the conference brochure for its designated lodging establishes regardless of whether rooms are still available at that rate.
- Always look for the BEST rate! Specifically, those establishments that offer complimentary services: free breakfast, airport-hotel shuttle, parking, Wi-Fi, etc.
- Only book at a commercial establishment. Traveler can stay with a family member or friend, but traveler cannot pay them and/or be reimbursed for the accommodations.
- If booking at an AirBnB or VRBO, NAU will reimburse upto the SAAM allowable rate, excluding taxes and fees, this includes the nightly rate and cleaning fee combined.
- Ask for the *lowest available rate for single occupancy*, NAU does not necessarily qualify for the *government rate*, be sure to ask when booking.
- Lodging “amenities” sheet is to be included with travel documentation. It should include any complimentary services and/or additional charges; meals, parking, etc.
- Lodging receipts must be itemized and show a zero-balance due, when possible, but clearly state payment in full has been made. Be sure to get a “final bill” or folio receipt when checking out.
- Any personal expenses; phone calls, Wi-Fi, room service, etc. is to be paid out-of-pocket when checking out and removed from the final hotel bill. [\(TRV 535-02\)](#)

**Transportation:** *Is to be selected based on the most reasonable and customary mode of transportation, the most commonly traveled route consistent with the authorized purpose of the trip, time effectiveness and for the benefit of the university.* ([TRV 530-01](#))

Airfare:

- At least 21-day advance purchase.
- Use commercial US carriers only. ([TRV 530-03](#))
- Fly the most direct route – time is money too. ([TRV 530-01](#))
- Do NOT use the PCard to purchase special, upgraded, or specific seat assignments. This expense must be paid out of pocket and is **not** reimbursable. ([TRV 515-07](#))
- Do not purchase flight insurance – never, ever! ([TRV 530-02](#))

Baggage:

- Flight baggage fees can be paid on the PCard, *within reason*.

NAU Transportation Service: ([TRV 525-03](#))

- Plan accordingly – NAU fleet vehicles book fast!
- The Transportation Services online Vehicle Requester is under construction, please do not use! Instead, complete the **Vehicle Rental Request** form, located on the Fleet Services webpage, <https://in.nau.edu/university-transit-services/fleet-services>. Send the completed form to [Fleet.Services@nau.edu](mailto:Fleet.Services@nau.edu). Fleet Services will respond with a confirmation once we have the reservation in the books.
- If NAU Transportation Services books a rental car from an outside agency, on behalf of the traveler, the department will be billed by NAU Transportation Services and all university fleet vehicle travel policies apply.
- If traveler has a fleet vehicle and they are on authorized “down-time”, traveler is not actively in university business travel status, the car must remain parked & unused until travel status resumes.

Rental Car: ([TRV 525-06](#))

**Option 1:** NAU has a contract with Enterprise Car Rental. Use this site for booking:

[http://legacy.enterprise.com/car\\_rental/deeplinkmap.do?bid=028&refId=NORAZUNI](http://legacy.enterprise.com/car_rental/deeplinkmap.do?bid=028&refId=NORAZUNI).

The contract will automatically add the CDW insurance for free and we are not charged for underage (25 years) drivers. **NOTE:** The rental must be paid with a **PCard**, do not have the university billed directly, travelers and departments are not authorized for that function.

**Option 2:** NAU Transportation Services *will* book out-of-state car rentals for travelers and bill the department via IDT – traveler will NOT need a PCard when picking up the car. Please note that a \$5.00 processing fee will be billed to the department. To request the service, complete the *Vehicle Rental Request* form, located on the Fleet Services webpage, <https://in.nau.edu/university-transit-services/fleet-services>. Instructions are listed above under the NAU Transportation Services heading.

**As a reminder....**

- No rental car can be booked if attending a conference or workshop out of state.
- Collision Damage Waiver Coverage - CDW Insurance Only! Required for all out of state rentals.
- No other insurance coverage is to be accepted/purchased!

- If a traveler is riding as passenger in a vehicle, the transportation cost is recorded on the passenger's Exhibit J as \$0. [\(TRV 525-01\)](#)
- Reimbursement of bridge and toll road expenses require an original itemized receipt that illustrates proof of payment – no matter the dollar amount. [\(TRV 525-01\)](#)
- Do NOT pre-pay for fuel/gas option, even if the listed rate is a “good deal”.
- No additional hardware options – including: GPS and toll-box meters (when given the option).
  - o Pay any tolls on the PCard or with cash (reimbursable) and get a receipt.
- Any additional charges for insurance coverage or vehicle upgrades will be deducted from the traveler's overall M&IE reimbursement. If no reimbursement is due to the traveler, traveler will be required to produce a money order (made out to NAU) or cash for the total amount due.

Ground Transportation – out-of-state: book in the following order!

1. Shuttle Service – airport/hotel is the default, before taking any other means of transportation. [\(TRV 525-08\)](#)
2. Taxi's & other forms of public transportation – traveler can use the PCard to purchase.
3. Uber, Lyft and other non-licensed forms of transportation are discouraged for safety and inconsistency in charges/recourse on reimbursement of expenses – upcharges, services, etc.
4. Transportation to and from meals is part of M&IE and is to be paid out-of-pocket. [\(TRV 540-01\)](#)

Parking: [\(TRV 530-02\)](#)

- Sky Harbor Airport parking is allowable at \$6.50/day max (base rate). Any dollar amount over the \$6.50/day allowable will be deducted from travelers overall M&IE reimbursement. If no reimbursement is due to the traveler, traveler will be required to produce a money order (made out to NAU) or cash for the total amount due.
  - o The ParkingSpot—4040 E. Van Buren St., Phoenix, AZ (602) 286-9212, 24/7 service—currently offers rates that comply with State reimbursement limits. Travelers must present a Spot Club Card to take advantage of the discounted rate by joining the vendor's Spot Club (<https://www.theparkingspot.com/locations/phoenix/phx/the-parking-spot-2>). For a limited time, State employees may also obtain the Club Card at the parking lot by showing their official State picture identification badge. (An employee's failure to acquire a Spot Club Card will not justify the granting of an exception from the reimbursement limitation.)
- Valet parking fees are not reimbursable and are not to be paid on a PCard.

**Meals & Incidentals (M&IE): [\(TRV 540-01 thru 540-07\)](#) – Rates updated 10.1.18, effective for NAU 11.15.18**

- Due to significant changes to the Meal & Incidental Expense policies, please reference the full policy at the end of this statement or directly on the Comptroller's Travel [website](#).
- M&IE for Alaska, Hawaii and all Foreign travel: [\(TRV 550-01\)](#): Reference NAU travel policy or the SAAM schedule for the formula for calculating meal & incidental (M&IE) reimbursement limits for Alaska, Hawaii, and all foreign locations.
- For days of departure involving an overnight stay, the meal and incidental reimbursement (M&IE) limitation is 75% of the full day rate of the night's destination. For days of return, the meal and incidental limitation is 75% of the full day rate for the location in which the traveler stayed the previous night.

**Exception to Policy Signers:** *If planning accordingly, rarely should a traveler need an exception to policy.* ([TRV 520-01](#))

- A written Exception to Policy justification is to be completed by the individual responsible for the policy violation and are to be submitted, whenever possible, prior to travel. Any cost saving claims must be supported by documentation such as printed travel quotes, savings calculations, etc.

**3<sup>rd</sup> Party Payment/Reimbursement:** *3<sup>rd</sup> Party Classification is non-NAU, non-AZ state entities ONLY!*

- If a 3<sup>rd</sup> party entity will be *reimbursing the traveler* directly for their travel expenses, the traveler must pay all travel expenses out-of-pocket. NAU is to incur none of the expense.
- If a 3<sup>rd</sup> party entity will be *reimbursing NAU directly* for any travel expenses, the traveler may pay with a NAU PCard.
- Only one of the above options should be used – all or nothing concept.

**Personal Vehicle Use:** ([TRV 525-02](#), [TRV 525-04](#), [TRV 525-05](#))

- A traveler driving a privately owned vehicle on university business must have current vehicle insurance and a valid driver's license and meet Authorized Driver program requirements. ([TRV 525-04](#))
  - A Mapquest/Google map print out with specific street address, city, and state for beginning and ending travel locations must be submitted with the Exhibit J.
  - Commute miles are not reimbursable and must be deducted from total travel miles.
- If traveler is not an Authorized Driver *prior* to start of travel, they will not be eligible for any travel reimbursement associated with the use of their personal vehicle – mileage, parking fees, etc. ([TRV 525-02](#))

**Personal Time Attached to a NAU Business Trip:**

- Traveler is responsible for purchasing their own flight to and from the business destination and will be reimbursed **only** if they provide (3) quotes/comparison flights, *at the time of booking*, that fit the business need of the trip. **No quotes, no reimbursement!**
- Traveler will not be reimbursed M&IE until the actual business event begins, and reimbursement ends at the conclusion of the event or when the travel leaves the event for personal time, whichever occurs first.

**Miscellaneous:**

- **Do NOT use a rewards program card/account in conjunction with a NAU PCard purchase. Applying a travel expense purchase towards an established and/or new vendor rewards program is a direct violation of state and university procurement policy and will result in a Notice of Violation and potential revocation of your PCard!** ([CMP 401-03 & TRV 515-01](#))
- Lost or missing receipts/bills: If the original receipt is lost and a copy cannot be obtained from the establishment, then a copy of the PCard PeopleSoft charge can be submitted as proof of purchase,

accompanied by a letter prepared by the *supervisor*. The letter must contain the traveler's name, the dates of the trip, the name, address and telephone number of the establishment/vendor, the unit and total cost. The letter should include the reason(s) why an original or copy of the receipt is not available. Letter must also be signed by the Exception to Policy signer. ([TRV 515-02](#))

- Tipping is part of the M&IE claim and is NOT reimbursable separately; includes: meals, room service, laundry, etc.
- The original, ***itemized*** receipt is required for ***any*** NAU PCard purchase. ([TRV 515-02](#))
- An original itemized receipt is required for any *reimbursable* personal expense. This includes *reimbursable transportation* related expenses: taxi, parking, tolls, etc. - the original itemized receipt is required no matter the dollar amount. ([TRV 515-02](#))
- Event swag (t-shirts, commemorative photos, etc.) are considered personal purchases and are not to be paid on the PCard. ([TRV 515-07](#))