



# The University of Montana – Helena

## COLLEGE OF TECHNOLOGY

Travel Procedure Highlights (aka: Road Map to Hassle Free Business Travel)

Before you travel:

1. **Required:** Complete a “Request and Authorization to Travel” form.
  - a. The form is available at <http://umhelena.edu/businessservices/default.aspx>
  - b. Select the “Employee RAT” tab of the spreadsheet.
  - c. The form must be signed by the employee and their supervisor.
  - d. Copies of this form must be submitted to UMH Business Services with **all** expense documentation; i.e. Airline tickets, registration fees, hotel bills, etc.
2. Request a Procard from UMH Business Services if you don’t have one.
  - a. Procard is a credit card issued to an employee to pay authorized business expenses only.
  - b. It can take three weeks to get a Procard issued so plan accordingly.
  - c. You **must** use a Procard to purchase:
    - i. Airline tickets
    - ii. Hotel/Motel rooms
    - iii. Rental cars
  - d. You **may not** purchase meals, groceries or personal items with the Procard.
3. Arrange for a Motor Pool vehicle for all out-of-town car travel.
  - a. State Motor Pool vehicles are the preferred method of car travel.
  - b. Personal vehicles may only be used with the prior approval of the employee’s supervisor and only when:
    - i. A State Motor Pool vehicle or other State-owned or leased vehicle is not available, or
    - ii. The use of a personal vehicle is considered to be in the best interest of the college.
  - c. To reserve a Motor Pool vehicle please see UMH Business Services for the list of authorized signers.
4. Arrange your Hotel/Motel room(s)
  - a. Use your Procard to make your reservations.
  - b. For in-state travel request the “**State Rate**” for rooms. (You will need to have your employee ID with you when you check-in at the hotel/motel.)
  - c. For out-of-state travel room rate guidelines can be found at:  
<http://www.gsa.gov/portal/category/21287>
  - d. You will need to get an **itemized** receipt when you check-out of the room.
  - e. Make sure to pay for all personal expenses; i.e. meals, movies, phone calls, etc. with personal funds as these may not be charged to the Procard.

5. Book your Airline tickets
  - a. Use your Procard to make your reservations.
  - b. Begin early to get the best airfares.
  - c. If you book on-line, print out the invoice/confirmation
  - d. Turn in the invoice to UMH Business Services as soon as you have the flight booked.
    - i. Don't wait until after you return from your trip.
    - ii. Include a copy of your Request and Authorization to travel form.

Upon your return:

1. Complete a "Travel Expense Report"
  - a. The form is available at <http://umhelena.edu/businessservices/default.aspx>
  - b. Select the "Employee TER" tab of the spreadsheet.
  - c. Attach all relevant receipts to the form
    - i. Hotel/Motel itemized receipts
    - ii. Miscellaneous business expenses; i.e. copies, office supplies, etc.
    - iii. Motor Pool vehicle trip receipt.
    - iv. Copy of the meeting agenda.
  - d. Fill in the appropriate number of meals being claimed. Meal per diem is not available when meals are provided as part of your training or conference.
  - e. The form must be signed by the employee and their supervisor.
  - f. Turn the form into UMH Business Services.
  - g. Amounts owing to the employee will be paid via separate check directly to the employee.

If you have questions or concerns that are not listed above please check with UMH Business Services before committing to the expenditure of college funds. You can also review the complete UM Travel Guidelines here <http://www.umt.edu/bussrvcs/files/Travel%20Procedures.doc>.