University of North Texas
AERI/IAS
Guide to University Business Travel

Student Employees, Faculty, and Staff

Before Traveling

- Makenzie "Mak" Brown is the primary contact for AERI/IAS Travel. Tara Principato will also be coordinating travel. Please send all communication related to travel to AERI-Travel@unt.edu.
- All student employees, faculty, and staff who wish to travel on University business MUST complete the Coupa Travel Training in the UNT Learning Bridge. Be sure to complete the "Request User License" phase, as this will trigger your account creation.
- *Add Makenzie Brown as an expense delegate*. If you do not complete this step, your travel *will not* be processed. Instructions for adding an expense delegate can be found here.
- Secure funding for your travel. This might include reaching out to your PI to confirm that they are funding your travel and receiving the chartstring that will cover your travel costs. If you are applying for or have received travel awards, please indicate that on your travel form.
- University policy requires a travel request be input for all University business travel, even if the travel is not funded by the University. *You will need a chartstring for your request even if no funding is available and all costs will be out of pocket.* Indicate in your request that your provided chartstring is a placeholder, and we will encumber (put a hold on) a small amount of funds to ensure that the request is processed and the travel is documented and insured. This also applies if a travel award will be funding some or all travel expenses. Travel awards cannot be used on requests; A chartstring must be provided for the request, which will act only as a placeholder until the trip is expensed on return using the travel awards.
- As soon as you are planning to travel for UNT business and the previous steps are finished, complete the AERI Travel Form in its entirety and email it to AERI-Travel@unt.edu. Include in the email any additional pertinent information you did not enter into the form.

During Travel

- Make yourself familiar with the expenses allowed by your funding source. If you pay for something that is not eligible to covered by your funding, you could be responsible for paying for it out of pocket.
- Voluntary tips are NOT allowed on grants or Travel Cards. However, mandatory tips (such as automatic gratuity) are allowable. If you would like to leave a voluntary

tip, do so in cash or with the understanding that tips cannot be reimbursed from grant funds and will be out of pocket expenses.

- To receive reimbursement or expense your travel card, you MUST have itemized receipts for all purchases. Itemized receipts should contain the following:
  - Merchant/vendor name and location
  - Description of purchase
  - Date of purchase
  - Reference to the method of payment (e.g. cash, credit card, etc.)
  - Amount of the purchase (including any taxes paid)
- Ensure meal receipts contain the following:
  - Itemized receipt of order (note that alcohol CANNOT be paid for using University funding).
  - Tip amount (Also non-reimbursable)
  - Total expense amount
- Ensure ground transportation receipts contain the following:
  - Merchant/vendor name and location
  - Start/end destination
  - Date of travel
  - Tip Amount (non-reimbursable)
  - Total expense amount
  - Travel purpose (to hotel, to conference, to airport, etc.)
- Ensure lodging receipts contain the following:
  - Name and address of hotel
  - Dates of stay (check-in & check-out)
  - Itemized charge breakdown (room rate, tax, service charges, etc.)
- All receipts should be sent in a digital format (e.g. photos or scans of paper receipts, PDF digital receipts).
- The Coupa app is available to download for both iOS and Android. In the app, you can download receipts as you get them and add them to your account to expense when you return. You can also take pictures of physical receipts and upload them.
- <u>It is your responsibility to retain all receipts for purchases that you paid for. Without a proper receipt, you may not get reimbursed.</u>

<u>Upon Return From Traveling</u>

- When you return from traveling, you will need to provide all receipts to AERI Travel to be processed.

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- If you choose to email your receipts, please title your email with your name, the date of your travel, and a brief description. Example: “Makenzie Brown 5/15-20/26 Austin research trip receipts.”
- If you choose to upload your receipts using the Coupa app, please send an email to AERI-Travel@unt.edu with a list of the receipts you would like expensed to ensure we have access to all of them.
- <u>If you attended a conference, please provide the program or agenda with your receipts.</u>
- After receiving all receipts, your trip will be expensed, and any reimbursement due to you will be credited to your bank account on record with UNT.