

# WGS TRAVEL APPROVAL FORM

## PART A - MUST BE COMPLETED AT LEAST 8 WEEKS PRIOR TO TRAVEL

NAME \_\_\_\_\_ UO ID \_\_\_\_\_ DATE SUBMITTED \_\_\_\_\_

From Date	To Date	Destination(s)

### 1. TRAVEL PURPOSE

Please describe where you're going, dates, and the key business activities (presenting paper, chairing a panel, performing research...).

#### Business Purpose

Is personal travel (non-business) included?  Yes  No If yes, please list dates \_\_\_\_\_

### 2. TRAVEL DURING CLASSES

Will you miss any classes because of this trip? If so, what arrangements have you made for the class in your absence?

### 3. EXPENSE ESTIMATES

Please submit any relevant invoices or receipts.

#### CONFERENCES

**REGISTRATION FEE** For \_\_\_\_\_  Need reimbursement **Amount** \_\_\_\_\_

**MEMBERSHIP RENEWAL** For \_\_\_\_\_  Need reimbursement **Amount** \_\_\_\_\_

#### TRANSPORTATION

**Air travel**  Please book for me via travel office (recommended)  Need reimbursement **Amount** \_\_\_\_\_

**Drive there in...**  Personal vehicle  UO vehicle  Rental vehicle Mileage \_\_\_\_\_ **Amount** \_\_\_\_\_

When renting a car (either to get to your destination or as local transport at your destination), you must:

1. Rent through a UO-approved company (Enterprise or Hertz) OR Purchase LDW/CDW insurance if renting from another company
2. Choose an economy car OR justify upgrade to larger vehicle

When driving on UO business, you must have current driver certification on file in the WGS office, even if driving your own vehicle!  
Contact the office if you don't know if you have this.

## LODGING AND PER DIEM ESTIMATES

These are meant to be ballpark figures; please enter the total number of days and nights in each line. The form will automatically calculate the estimated cost. If you are filling out by hand, the office will estimate the cost.

**Lodging nights** \_\_\_\_\_ @ ~\$128/night      **Amount** \_\_\_\_\_

**Number of trip days** \_\_\_\_\_ @ ~\$57/day      **Amount** \_\_\_\_\_

**Total estimated expenses\*:** \_\_\_\_\_

## 4. INTERNATIONAL PREPARATION

If you are traveling internationally, check and complete these things.

Registered with [Office of Risk Management](#)       Passport is current and valid       Visa obtained (if needed)

## 5. SIGNATURE & APPROVAL

**Traveler's Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

Before departure, complete this form (PART A) and submit to the WGS office at [wgs@uoregon.edu](mailto:wgs@uoregon.edu). The office will evaluate faculty funds to determine allocation of expenses and work with the department head for final approval.

Don't forget to pick up an envelope with PART B and take it with you. Use this envelope to collect your receipts and other relevant documents acquired during travel.

## 6. OFFICE USE ONLY

**Office verification of funds:** Faculty member has sufficient funds to cover travel expenses       Yes       No

**List funds to be used** \_\_\_\_\_

**Office staff initials** \_\_\_\_\_ **Date** \_\_\_\_\_

**Department Head Approval** \_\_\_\_\_ **Date** \_\_\_\_\_

## **Additional Information about UO Travel**

### **Business Purpose:**

All Travel Reimbursements/Payments must include a business purpose. The business purpose should be descriptive enough to clearly answer any questions regarding who traveled, the necessity of their travel, the duration of travel and the benefit to UO. IRS defines purpose as "Business purpose for the expense or the business benefit gained or expected to be gained". Please spell out any acronyms. Add any details deemed important to explain circumstances.

For more information on business purpose and examples visit:

<http://ba.uoregon.edu/content/travel-reimbursement#business-purpose>

### **Personal Travel:**

Are you arriving early or staying additional non-business (personal) days? If so please let us know. For air travel we will need to get comparison quotes. Often when people add personal days it can be less expensive and therefore is no extra cost to the traveler. In cases where the personal travel is more expensive the traveler can pay the difference between the business quote and the personal comparison quote.

See details on comparison quotes for personal and business travel here at:

<http://ba.uoregon.edu/content/air-travel-when-to-get-comparison-air-fare-quote#-b-combining-business-and-personal-travel-b->

### **Lodging Rates** (effective 1/1/16):

Low Cities: \$128.00/night + Tax

High Cities: \$207.00/night + Tax

Non-commercial lodging (with friends, family, etc): \$25/night

If attending a conference, try to stay at the officially documented conference hotel. We are able to fully refund the official conference rate.

Ask if you would like to be sent the current high cities spreadsheet.

### **Meal Rates** (effective 1/1/16):

Low Cities: Breakfast - \$14.25, Lunch - \$14.25, Dinner- \$28.50, Daily - \$57.00

High Cities: Breakfast - \$17.00, Lunch - \$17.00, Dinner- \$34.00, Daily - \$68.00

Per diem for a meal may not be claimed if food is provided (conference banquets, etc).

Ask if you would like to be sent the current high cities spreadsheet.

### **What is the Accountable Plan?**

The Accountable Plan is the IRS method UO uses for making travel reimbursements to individuals. UO travel policies exist to comply with the rules of the accountable plan set by the IRS. Not every travel scenario is spelled out in UO policy so when questions arise the Travel Department goes back to the fundamentals of the accountable plan to make decisions. The accountable plans rules are:

- 1) the expenses must have a business connection;
- 2) the expenses must be adequately accounted for within a reasonable period of time;
- 3) any excess reimbursement or allowance must be returned within a reasonable period of time.

For more details visit: <http://ba.uoregon.edu/content/accountable-plan>