

Faculty Travel

The Ins and Outs of Traveling with UNT & department held Money

Please note any and all travel using any funds, including non-DAC awarded funds, requires an approved Travel Request prior to travelling

In the Beginning...

How to Request Funds from the History Department

Award Periods

- History Department Travel Grants are broken down into 3 Award periods:
 - Fall (September 1st- December 31st)
 - Deadline for submission: September 1st
 - Spring (January 1st- May 31st)
 - Deadline for submission: January 15th
 - Summer (June 1st- August 31st)
 - Deadline for submission: May 1st
 - If your trip dates are within a couple of days of a submission deadline, please submit the travel request at the previous deadline. Ex. Trip dates are Jan 15-18, so submit at the Fall Sept 1st deadline, so there's time for a travel request to be approved.

Required Documentation

- The following **MUST** be included with your application to be considered for funding:
 - History Department Request for Travel Form
 - Faculty Application for Approval of Leave
 - A copy of the conference program, invitation, etc... documenting the need for travel

Types of Travel Grants

Large vs. Small Travel Grants

Large Travel Grant

- Who: Tenure-track, tenured, or full-time lecturers with multi-year appointments
- Only 1 Large Travel Grant per faculty per fiscal year
- Funds Awarded based on table

Large Travel Grant Chart

| Estimated Cost of Trip | Maximum Departmental Funding |
|------------------------|------------------------------|
| \$600-699 | \$699 |
| 700-799 | 799 |
| 800-899 | 899 |
| 900-999 | 950 |
| 1000-1099 | 1000 |
| 1100-1199 | 1050 |
| 1200-1299 | 1100 |
| 1300-1399 | 1150 |
| 1400-1499 | 1200 |
| 1500-1599 | 1275 |
| 1700-1799 | 1400 |
| 1800-1899 | 1475 |
| 1900-1999 | 1525 |
| 2000-2099 | 1600 |
| 2100-2199 | 1700 |
| 2200-2299 | 1800 |
| 2300-2399 | 1900 |
| 2400-2499 | 2000 |
| 2500-2599 | 2100 |
| 2600-2699 | 2200 |
| 2700-2799 | 2300 |
| 2800-2899 | 2400 |
| 2900-2999 | 2500 |
| 3000 & above | 2600 |

Large Travel Grants- Eligible Scholarly Activities

- Presentations and activities include general session papers, panel paper presentations, concurrent session papers, and keynote/plenary addresses to a sizeable portion of those attending an academic meeting or gathering of a learned society.
- Papers to be presented should be refereed, invited, or the result of some type of program selection review process, appropriate to the presenter's discipline.
 - Open sessions for presentations or posters, for which there is no formal review in advance of the session, are not eligible for a Large Travel Grant.

Large Travel Grant- Eligibility, continued

Funds may be awarded for persons involved in the following activities:

- Making presentations at international or national meetings
- Making invited or refereed presentations
- Making plenary or keynote sessions (defined as presentations to all conference attendees)
- Serving as president/chief operating officer of a national or international organization
- Serving as conference program/planning chair of a national or international organization
- Serving as a member of the conference program/planning committee for a national or international organization
- Priority given to organizations and meetings that are national and international in scope and significance

Small Travel Grants

limit 2 per faculty per fiscal year

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- Category 1 (\$500)
 - Presentation of research papers at meeting of professional organizations or symposiums
 - Category 2 (\$400-\$500)
 - Participants as chairs of sessions or critics/discussants in meetings of professional organizations, conferences, symposiums, and roundtables for scholars of university status
 - Category 3 (\$300)
 - Presenting research papers at professional meetings of historical associations not primarily for scholars of university status
 - Category 4 (\$200)
 - Other professional or quasi-professional travel
 - Examples: travel to accept an award or honor; guest lecturer to a non-professional audience

Important Notes:

- Please remember- these are general guidelines. For more details regarding eligibility, priorities, and limitations, please refer to the official Travel Policy on the History Department website (<https://class.unt.edu/history/department-information/travel.html>) & UNT Travel Guide (https://finance.untsystem.edu/sites/default/files/documents/unt_system_travel_guide_05-02-24.pdf).
- If you are planning on **ANY** travel, submit RTF form to Miranda Leddy as soon as you know about the trip.
 - ALL travel requests **MUST** be submitted no less than **2 weeks** before trip start date
 - Do **NOT** purchase anything for the trip before the RTF has been submitted, and Miranda informs you that it has been approved.
 - Anything purchased prior to the trip being approved in the UNT System is subject to not be reimbursed.
 - If your travel is international you must send the international travel registration confirmation you receive from Emergency Management to Miranda Leddy, so she can attach it to your travel request. Please note all international travel must be registered at least 3 weeks before you leave on your trip.

Traveler Must-Haves

What you need to know before traveling

Things to know/have before you travel

Texas Travel

- If you are traveling within Texas, you will need to provide the hotel with UNT's [Tax Exempt Certificate](#)

International Travel

- Before traveling internationally, your trip must be reported to AND approved by Risk Management. You can find the form at: https://riskmanagement.unt.edu/emergency/international_travel.html
- Please note all international travel must be registered **at least** 3 weeks before you leave on your trip.
- You will need to provide the approval email with your travel grant applications

Acceptable Receipts

- Hotel Receipt Requirements:

- The name and address of the commercial lodging establishment,
- The name of the employee,
- The single room rate,
- A daily itemization of the lodging charges; and
- Proof of payment.

(Air BnBs are not preferred, but can be approved with all receipt requirements met)

- Airfare
- Taxi/Lyft/Uber/Train
- Registration
- Mileage (if applicable)

*All receipts must be itemized and show proof of payment

*All receipts must be turned into Miranda Leddy no later than 2 weeks after conclusion of trip

Meals

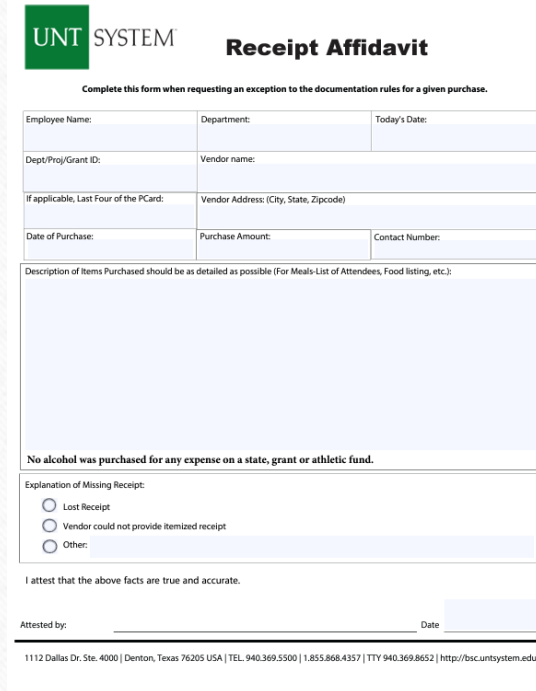
- Submit all meal receipts upon your return from travel.
 - Meals will only be paid for the single traveler with an approved travel request, unless there is a legitimate business reason for having a business meal with another person, involving them doing business with UNT.
 - Meals provided to a spouse, family member or other personal acquaintance of a UNTS employee will be permitted only when there is a substantial and bona fide business reason for that person's attendance.
 - Any business meal receipt must have a [Meal Reimbursement Request](#) filled out and submitted.
 - You can find this form on the History site under Forms>Miscellaneous Forms and Documents
- Reminders:
 - If you are using Per Diem for meals, you must indicate this on your Request for Travel form, otherwise you will be expected to keep track of all your meal receipts and submit them upon your return from travel.
 - Tips/Gratuities for meals are allowed up to 20%

How to submit receipts

- All receipts should be submitted digitally, so please scan them each separately into a PDF document, or otherwise, and email them to Miranda at Miranda.Leddy@unt.edu
 - Each receipt should have its own file, instead of being submitted as one large file
- Please make sure that all receipts have a clear date, location, and business purpose (breakfast, lunch, dinner, parking, hotel, flight, etc.)
 - For Lyft/Uber, etc. please indicate where you were going to/from and/or what the travel was for
 - For parking please indicate what it was for – at hotel, your research site, etc.
- Please take special care when submitting international receipts to note dates, locations (city, country), what the receipt is for, etc. so I can interpret what you did on your trip.

Lost Receipts Process

- If you have lost a receipt, or were not issued an itemized receipt, you can fill out a [lost receipt affidavit](#) to submit with your other receipts upon return from your trip.
- Each lost receipt requires its own lost receipt affidavit.
- The lost receipt affidavit can be found under Miscellaneous Forms and Documents



The image shows a 'Receipt Affidavit' form from the UNT SYSTEM. The form is titled 'UNT SYSTEM Receipt Affidavit' and includes a sub-header: 'Complete this form when requesting an exception to the documentation rules for a given purchase.' The form contains several input fields for employee and vendor information, a large text area for describing the purchase, a section for explaining the missing receipt, and an attestation line. At the bottom, there is contact information for the UNT SYSTEM.

| | | |
|--|---------------------------------------|-----------------|
| Employee Name: | Department: | Today's Date: |
| Dept/Proj/Grant ID: | Vendor name: | |
| If applicable, Last Four of the PCard: | Vendor Address (City, State, Zipcode) | |
| Date of Purchase: | Purchase Amount: | Contact Number: |

Description of Items Purchased should be as detailed as possible (For Meals-List of Attendees, Food listing, etc.):

No alcohol was purchased for any expense on a state, grant or athletic fund.

Explanation of Missing Receipt:

Lost Receipt

Vendor could not provide itemized receipt

Other:

I attest that the above facts are true and accurate.

Attested by: _____ Date _____

1112 Dallas Dr. Ste. 4000 | Denton, Texas 76205 USA | TEL. 940.369.5500 | 1.855.868.4357 | TTY 940.369.8652 | <http://bsc.untsystem.edu>

Non-Reimbursable Travel Expenses

- 1. Personal expenses –i.e. toiletries, toothpaste, shampoo
- 2. Laundry and dry cleaning
- 3. Use of Hotel fitness equipment
- 4. Pillow for air travel/flight
- 5. Kennel expenses for pets
- 6. Excess baggage charges (personal belongings)
- 7. Airline Club dues
- 8. Hotel video rentals (personal entertainment)
- 9. Travel insurance-coverage for individual's "health" while traveling
- 10. Child Care

Please Note:

- All non-reimbursable travel expenses submitted will be considered a personal expense and will not be reimbursed
- **Business Purpose**-A *state agency* may reimburse a *travel expense* only if the purpose of the travel clearly involves official state business and is consistent with the agency's legal authority.

Fun with Coupa!

Submitting Travel Authorization Requests and Reimbursements via
Coupa

Approving Concur Reports

When a trip is requested (RTF form), Miranda Leddy will enter the trip into the Coupa System

Once the trip is approved, you should receive an email notification from Coupa

This report can be reached at myhr.unt.edu->
Employee Resources-> Coupa Expense

This will begin the process for approval through the UNT System. Once your trip is approved you can proceed with purchasing airfare, etc... for your trip.

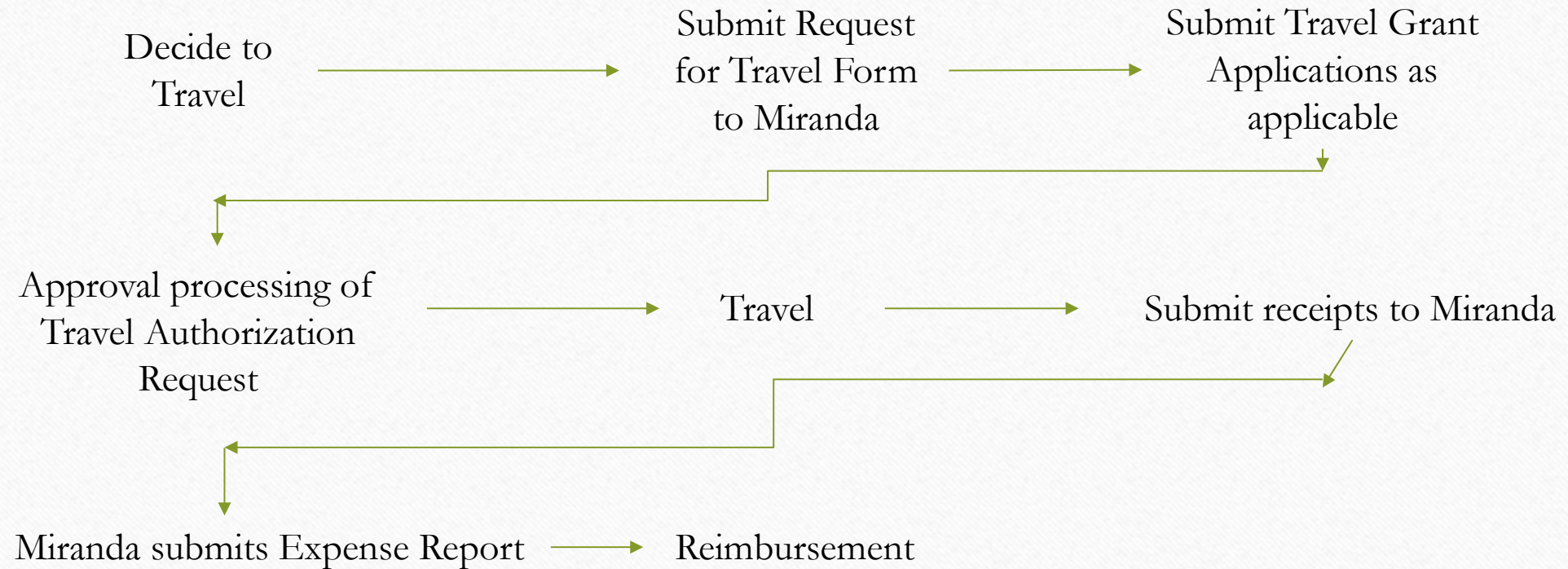
Upon returning from your trip, submit your receipts to Miranda Leddy, who will enter them into the Expense Report for reimbursement.

Once the Reimbursement is approved, you should receive an email notification and payment issued within a few days after approval

The screenshot displays the Coupa system interface. At the top left is the UNT University of North Texas logo. To the right of the logo are navigation options: '+ New', '01 Authorization Requests' (circled in red), '00 Available Expenses', and '00 Open Reports'. Below the header, there are two tabs: 'TRIP SEARCH' and 'COMPANY NOTES'. The main content area shows a table with one row: 'Research Museum \$630.46' with a trash icon to the right. Below the table, it says 'Not Submitted'. To the right of the table are two buttons: 'Copy Report' and 'Submit Report' (circled in red).

**Do NOT *create* any reports in Coupa.
This could invalidate your reimbursement.**

Travel Cycle



Travel Links

- [History Travel Forms](#)
- Contact: Miranda Leddy

WH 225A

Miranda.Leddy@unt.edu

940-369-8932