



Quick Reference Guide – Form Instructions for filling out the Request and Authorization to Travel

Business Services
The University of Montana
Missoula, Montana 59812-1254

Procedure: QR1402
Revision Date: 11/05/10
Revision Number: 4

Request and Authorization to Travel – Data Entry Form

The Request and Authorization to Travel form is required and is designed for easy data entry. The form provides Business Services with appropriate information including reasonable estimated expenses for your trip plan. Use the **Tab** key to tab through each field. Some fields on the form are used for calculation purposes in which data cannot be entered. All fields where data entry is allowed pertinent to your trip must be entered. Links to related web sites and documents are provided for your convenience on the form. Please be sure to provide the most accurate estimate of costs that you think you will incur.

Please Note: If there are multiple airline tickets, rental cars and lodging and conferences for the same trip, list the totals for these multiple items on the Request and Authorization to Travel form, summarize these items on a separate sheet and attach to the form when submitted. For multiple trips, list these trips separately on separate Request and Authorization to Travel forms. If authorization to travel is submitted early, the check meal per diem will be issued six days prior to the departure date. Direct Deposit is also available and we encourage the use of the direct deposit method to expedite your receipt of per diem.

Traveler Information

Employee/Non Employee – Check the appropriate box.

Traveler ID – Enter your Banner ID.

Employee Name – Enter the traveler's name.

Employee Address – Enter current address.

Department – Enter the traveler's department.

Destination – Enter the traveler's destination.

Business Purpose – Enter a clear description of your trip.

Departure Date/Time – Enter the expected date of departure and the expected time of departure.

Return Date/Time – Enter the expected date and time the traveler will return.

Itinerary (Air fare, Hotel/Motel and Taxes, Rental Car should be paid by UM Procard – Receipt required)

Airfare

Amount – Enter the amount of the charge to the Procard for air fare. Include agency fees charged in the total. Tab to insert additional information.

Vehicle

Rental Car – If you are renting a vehicle, enter the amount for the rental. Tab to enter the vendor.



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Private Vehicle

Expected Miles – Calculate and enter the expected miles for your trip.

Mileage Rate – Enter the applicable mileage rate from the summary chart.

Mileage Rate Justification – Enter the justification for the mileage rate.

Lodging (See Travel Procedure for Per Diem Rates). Itemized receipts required. Enter the total amount for the lodging including taxes. Tab to add notes.

Within Federal Rate? Click Yes or No.

If No and government rate request but not available, click Yes, otherwise fill out the [Travel Reimbursement for Actual Lodging Costs](#) form.

Registration - Enter the amount for the registration fees. Tab to notes to describe.

Miscellaneous Expenses – Enter the amount for expected miscellaneous expenses. Tab to add notes.

Meal Per Diem (Based on Departure/Return Time and In-State or Out-of State Rates) No receipts required. Use the calculator to calculate the meal per diem.

Travel Status for airline travel begins 1 ½ hours prior to actual departure time.

Breakfast – Enter the number of breakfasts that apply to your itinerary.

Lunch – Enter the number of lunches based on your itinerary.

Dinner – Enter the number of dinners based on your itinerary.

Rates – Click on the corresponding radio button for In-State or Out-of State which will automatically insert the current rates respectively. If the traveler will receive the meal per diem in advance, fill in the Index, Account, Activity (if applicable) and index amount. The Meal Per Diem Advance will be calculated.

Note: Accounts payable checks are issued on Thursday's only/ please use A/P direct Deposit if possible.

Submitted by – Enter the name of the person submitting the form and enter their title and date.

Print the form

Press **Ctrl – P** to bring up the print box and print the form.

Obtain Signatures

Traveler signs and dates.

Supervisor signs and dates.

Dept. Head/Designee signs and dates.



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**Forward the form to the Business Services Travel Desk located in the Lommasson
Center in the Accounts Payable Service Area of room EL261.**