

# TRAVEL WITH MCNAIR

step-by-step guide to planning a trip



## 1 Plan

Think about your trip and what you may need (registration fees, lodging, transportation, etc.) and fill out a funding request one month before the month you intend to travel.

## 2 Budget

After your request has been approved, get in touch with Meghan about specific plans (flight plans, hotel reservations, and conference registration). She will help you navigate these things.

## 3 Prepare

Look into the graduate school you are visiting, prepare for your research presentation, gather materials you need for your graduate school interview. Do what you need to do!

## 4 Pack

Stop by the McNair office to get a travel folder from Meghan: the folder will include business cards, travel documents (i.e. flight and hotel information), and an evaluation form for you to take on your trip.

## 5 BE FREE!

Enjoy your trip, learn lots, and be a proud McNair scholar! Be sure to call if you have any questions, concerns, or crisis.

## 6 Documentation

Record your room number(s) on your itinerary and save all your receipts from your trip. DO NOT cut receipts; please fold them and save in travel folder.

## 7 Reimbursement

Complete a Travel Expense Report on TruView (Meghan can help) and give the complete report, all receipts and your travel folder to Meghan within one week following your trip.

## 8 Share

Meet with Dr. C (for professional conference) or Amanda (grad school visit) to review your trip evaluation and schedule a meeting with your mentor to discuss your experience.



## Travel Itinerary Instructions

Completion of an itinerary is required and should be completed at the same time as a funding request for upcoming travel for professional conferences or graduate school visits.

**Purpose:** The purpose of this itinerary form is to record **anticipated expenses** to be pre-paid by McNair staff or reimbursed upon your return.

### Step 1:

Prior to the first day of the month **before** your intended travel date, you need to complete a travel itinerary and funding request form to be approved by the Project Director. Links to the travel itinerary and funding request can be found on the McNair website, [mcnair.truman.edu](http://mcnair.truman.edu). It is recommended you complete the travel itinerary first, so you will have a more accurate estimated total on the funding request.

### Step 2:

The first page will ask for your name and the purpose of your trip. The purpose should include:

- Name of the conference or universities
- Location you went to
- Dates of travel or conference dates
- Why you went on this trip

## Day 1 Expenses

Date

Date

06/11/2018

Mode of travel

Air

Bus

Train

Rental Car

Personal Car

Other: \_\_\_\_\_

Mileage on personal car (# or n/a)

n/a

Preferred flight, train, or bus (copy link or n/a)

link

Preferred hotel (copy link or n/a)

link

Additional anticipated expenses (NOTE: You will not be reimbursed for meals provided by a conference.)

Breakfast (\$10)

Lunch (\$15)

Dinner (\$25)

Taxi, Uber, Lyft, etc.

Checked bags

Other: Conference Registration \_\_\_\_\_

If you know the anticipated cost of additional expenses please note them here (i.e. registration fees, checked bags, etc.)

\$150

Day 1 Expenses are accrued on the day you leave for your professional conference or graduate school visit.

Please include your preferred mode of travel, mileage on your personal car (if applicable), a link to your preferred departure flight, train, or bus (if applicable), and a link to your preferred hotel (if applicable).

Additional anticipated expenses include meals, taxis, ubers, lyfts, checked bags, registration fees, etc.; meal amounts provided are the maximum you can be reimbursed for meals from the business office.

In this example, Ron has included a flight, hotel, meals, and conference registration as anticipated expenses for the day before the conference (his first day of travel).

On the days you are attending a professional conference or visiting graduate schools you will record anticipated expenses for that date only.

NOTE: You will not be reimbursed for meals provided by the conference that you choose not to eat.

In example one, the conference is providing breakfast and lunch, so the only expenses are for dinner for day 2, while the conference also had a dinner banquet on day 3.

### Day 2 Expenses

Date

Date

06/12/2018

Mode of travel

- Air
- Bus
- Train
- Rental Car
- Personal Car
- Other: \_\_\_\_\_

Mileage on personal car (# or n/a)

Your answer \_\_\_\_\_

Preferred flight, train, or bus (copy link or n/a)

Your answer \_\_\_\_\_

Additional anticipated expenses (NOTE: You will not be reimbursed for meals provided by a conference.)

- Breakfast (\$10)
- Lunch (\$15)
- Dinner (\$25)
- Taxi, Uber, Lyft, etc.
- Checked bags
- Other: \_\_\_\_\_

If you know the anticipated cost of additional expenses please note them here (i.e. registration fees, checked bags, etc.)

Your answer \_\_\_\_\_

### Day 3 Expenses

Date

Date

06/13/2018

Mode of travel

- Air
- Bus
- Train
- Rental Car
- Personal Car
- Other: \_\_\_\_\_

Mileage on personal car (# or n/a)

Your answer \_\_\_\_\_

Preferred flight, train, or bus (copy link or n/a)

Your answer \_\_\_\_\_

Additional anticipated expenses (NOTE: You will not be reimbursed for meals provided by a conference.)

- Breakfast (\$10)
- Lunch (\$15)
- Dinner (\$25)
- Taxi, Uber, Lyft, etc.
- Checked bags
- Other: \_\_\_\_\_

If you know the anticipated cost of additional expenses please note them here (i.e. registration fees, checked bags, etc.)

Your answer \_\_\_\_\_

## Day 4 Expenses

Date

Date

06/14/2018

Mode of travel

- Air
- Bus
- Train
- Rental Car
- Personal Car
- Other: \_\_\_\_\_

Mileage on personal car (# or n/a)

Your answer

Preferred flight, train, or bus (copy link or n/a)

link here

Additional anticipated expenses (NOTE: You will not be reimbursed for meals provided by a conference.)

- Breakfast (\$10)
- Lunch (\$15)
- Dinner (\$25)
- Taxi, Uber, Lyft, etc.
- Checked bags
- Other: \_\_\_\_\_

If you know the anticipated cost of additional expenses please note them here (i.e. registration fees, checked bags, etc.)

Your answer

On the day you plan to return from the conference or graduate school visit, please include your preferred mode of travel, mileage on your personal car (if applicable), and a link to your preferred return flight, train, or bus (if applicable).

Additional anticipated expenses include meals, taxis, ubers, lyfts, checked bags etc.; meal amounts provided are the maximum you can be reimbursed for meals from the Business Office.

In this example, the conference will end before noon, with breakfast provided. Ron will take an afternoon flight and has additional expenses for lunch and dinner.

### Step 3:

Completion of this form will send an email notification to the Program Assistant. Your responses to the form will be recorded to a Google Sheet which the Program Assistant will use to purchase any pre-paid expenses. Please include the estimated grand total of expenses in your funding request for approval from the Project Director.

### Step 4:

Upon funding approval, please make an appointment with the Program Assistant to make any necessary purchases/reservations and to create your travel folder.

## Travel Expense Report Instructions

Completion of an expense report is required to be reimbursed for personal expenses from attendance to a professional conference or graduate school visit.

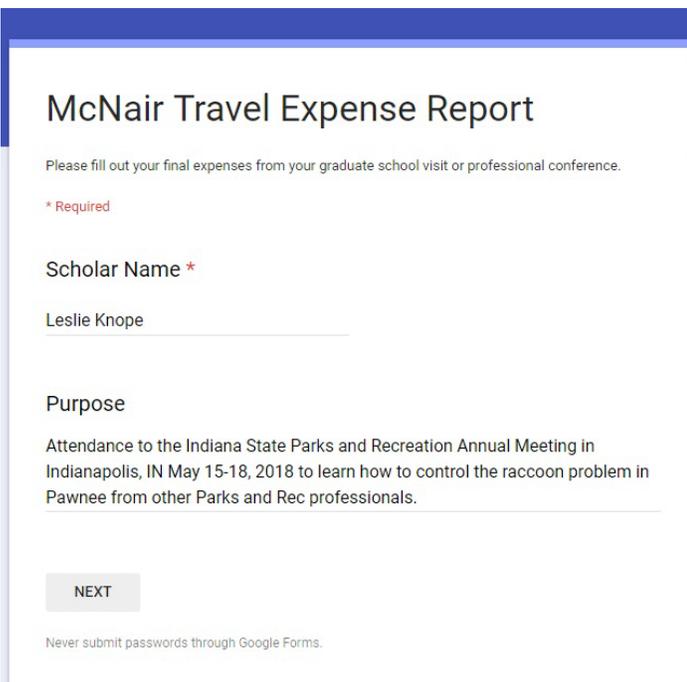
**Purpose:** The purpose of this expense report is to record **personal expenses**. Expenses pre-paid by McNair staff should not be included on this form.

### Step 1:

Following your meeting with the Program Assistant to make travel arrangements, you will receive a link to a Travel Expense Report Form for you to complete after your trip. Please do NOT delete this email.

### Step 2:

Fill out the Travel Expense Report form within **one week** after your return from your conference or graduate school visit. The form has multiple pages, but only those recording your dates of travel are required.



The screenshot shows a Google Form titled "McNair Travel Expense Report". At the top, it says "Please fill out your final expenses from your graduate school visit or professional conference." Below this is a red asterisk and the word "Required". The form has two main sections: "Scholar Name" and "Purpose". The "Scholar Name" field is filled with "Leslie Knope". The "Purpose" field is filled with "Attendance to the Indiana State Parks and Recreation Annual Meeting in Indianapolis, IN May 15-18, 2018 to learn how to control the raccoon problem in Pawnee from other Parks and Rec professionals." At the bottom of the form is a "NEXT" button and a small note: "Never submit passwords through Google Forms."

The first page will ask for your name and the purpose of your trip. The purpose should include:

- Title of the conference or names of universities
- Location you went to
- Dates of travel or conference dates
- Why you went on this trip

# McNair Travel Expense Report

## Day 1 Travel Expenses

### Day 1 date

Date

05/14/2018

### Time of departure

Time

06 : 00 AM

### Time of arrival

Time

09 : 00 AM

### Departure and arrival locations

Pawnee, IN to Indianapolis, IN

### Mileage on personal car (miles traveled or n/a)

n/a

### Breakfast expenses (dollar amount or n/a)

10

### Lunch expenses (dollar amount or n/a)

15

### Dinner expenses (dollar amount or n/a)

25

### Lodging expenses (dollar amount or n/a)

n/a

### Misc expenses (taxis, ubers, lyfts, bag checks, etc. or n/a)

Uber from airport to hotel: \$15

BACK

NEXT

Day 1 Travel Expenses are accrued on the day you leave for your professional conference or graduate school visit. The date, times, and locations of your departure and arrival are important information to include with your expenses.

In this example, Leslie included meal expenses and an uber her first day because hotel and flight reservations were made prior to departure; because Leslie flew, no mileage was put on the personal vehicle.

NOTE: You will follow this same process of adding times on the day you return; on all other days, please leave the times and locations blank.

On the days you are attending a professional conference or visiting graduate schools, you will write the date and expenses accrued.

In this example, Days 2 & 3 pages would be filled out the same way. On the date of return, Leslie took a 6AM flight back to Pawnee and only had breakfast while travelling. Because Leslie was not travelling during lunch and dinner, those meals were not included on the report.

### Day 2 Travel Expenses

Departure/arrival time and locations only required if the visit or conference ended on day 2.

#### Day 2 date

Date

05/15/2018

#### Time of departure

Time

: AM

#### Time of arrival

Time

: AM

#### Departure and arrival locations

Your answer

#### Mileage on personal car (miles traveled or n/a)

Your answer

#### Breakfast expenses (dollar amount or n/a)

10

#### Lunch expenses (dollar amount or n/a)

15

#### Dinner expenses (dollar amount or n/a)

25

#### Lodging expenses (dollar amount or n/a)

Your answer

#### Misc expenses (taxis, ubers, lyfts, bag checks, etc. or n/a)

Your answer

BACK

NEXT

Never submit passwords through Google Forms.

### Day 4 Travel Expenses

Departure/arrival time and locations only required if the visit or conference ended on day 5.

Date

05/19/2018

#### Time of departure

Time

06 : 00 AM

#### Time of arrival

Time

09 : 00 AM

#### Departure and arrival locations

Indianapolis, IN to Pawnee, IN

#### Mileage on personal car (miles traveled or n/a)

n/a

#### Breakfast expenses (dollar amount or n/a)

10

#### Lunch expenses (dollar amount or n/a)

n/a

#### Dinner expenses (dollar amount or n/a)

n/a

#### Lodging expenses (dollar amount or n/a)

n/a

**Step 3:**

Completion of this form will send an email notification to the Program Assistant. Your responses will be recorded to a Google Sheet which the Program Assistant will use to complete a Travel Expense Report on TruView for you within five business days. Please return your receipts and travel folder when you come to the McNair office to sign your expense report.

**Please Note:** In order to receive reimbursements for your travel expenses, you must arrange direct deposit through the Accounts Payable office in the Business Office.

Sign up for AP Direct Deposit:

1. Login to “TruView”
2. Click on the “Employee” tab
3. Under “Compensation and Benefits” channel, click on “Direct Deposit for AP Reimbursement