Travel 101
The Basics
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UB Travel Services
Travel 101 The Basics


Networking

1. a supportive system of sharing information and services among individuals and groups having a common interest:

- What needs to be done
- How do you know it’s right
- Tools to help
Why to do it

Getting it done correctly matters

- Reduce phone calls and emails
- Budget control
- Follow policies
- Everyone is Happy
What needs to be done

Become familiar with terms and definitions

- Per diem
  - Allowance for the day
- Travel status
  - 35 miles from home and UB
  - No N’s
- Conference single room rate*
  - Over lodging per diem
What needs to be done

Become familiar with terms and definitions

- **CTA**
  - Central Travel Account
  - State funded airfare and Amtrak
  - All employees

- **Fly America Act**
  - Federally funded RF grants
  - International travel

- **Agenda/Program**
  - What, where, when
What needs to be done

Understand general guidelines

**Lodging**
- Itemized paid lodging receipt
- Copy to support meal request
- Lodging with family and friends

**Meals**
- Per Diems
- Receipts not usually necessary

**Purpose of Travel**
- Program/agenda or detailed purpose of travel

**Forms**
- State travel voucher
- Mileage statement
- Research travel voucher
- Research mileage statement
- Etravel 😊

**Transportation**
- Cost-effective
- Air travel policy
What needs to be done

Gather pertinent information

- Lodging receipt
- Agenda
- Transportation receipts
- Forms
How to know it’s right

Look for key items on the hotel bill

- City
- Date of stay
- Daily room rate
- Confirm bill paid
- Other items (internet, food, parking)
- Tax exemption NYS
How to know it's right

Finding the per diem

Maine - FY 08
(October 1, 2007 through September 30, 2008)

- Determine the city
- Know the date of travel
- Per diem linked from UBS
- Write down per diem

<table>
<thead>
<tr>
<th>Primary Destination</th>
<th>County</th>
<th>Max Lodging (exc. rates)</th>
<th>M&amp;E Rates</th>
<th>Max Per Diam Per</th>
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</thead>
<tbody>
<tr>
<td>Portland</td>
<td>Cumberland, Sagadahoc</td>
<td>85</td>
<td>44</td>
<td>129</td>
</tr>
<tr>
<td>(Oct 1 – June 30)</td>
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<tr>
<td>Portland</td>
<td>Cumberland, Sagadahoc</td>
<td>107</td>
<td>44</td>
<td>151</td>
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<tr>
<td>(July 1 – Sept 30)</td>
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How to know it’s right

Meal per diem breakdown

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<th>Per diem</th>
<th>Breakfast</th>
<th>Dinner</th>
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<tr>
<td>$39</td>
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</table>
How to know it’s right

Determining meal per diems

- Per diem is 24 hour period
  - Check in
  - Check out
- Review agenda
- First and last day of travel
How to know it’s right

Meal definitions

Meal per diem **cannot** be claimed if the following meals are included/provided

Breakfast
Dinner
Banquet
Buffet

Meal per diem **can** be claimed when the following meals are included/provided

Continental
Reception
Party
Cocktail Party
How to know it’s right

Know how the trip is funded

- State funding
  - Airfare
  - Signature requirements

- Research funding
  - Airfare
  - Signature of PI
  - Sponsor guidelines
How to know it’s right

Review transportation expenses

Airfare
CTA, Fly America Act

Car Rentals
•Insurance
•__________________
•Tax exemption within NYS
•Cost effective
•Conference travel

Taxis, tolls, parking, etc.
•Purpose
•Receipts
•Necessary?
Tools to help

Complete the appropriate form
Tools to help

Individually billed Corporate Travel Card    Bank of America VISA

- No annual fee
- Business identification
- UB official logo on card
- Tax exemption

Travel Insurance
- 24 hour VISA travel and emergency assistance
- Auto rental insurance and roadside assistance
- $3,000 lost luggage insurance

- Separate business expenses
- Travel policies and procedures remain in effect
Tools to help
Valuable resources at your desktop  www.ubbusiness.buffalo.edu

• UBS Website
• Per diem
• Currency converter
• Policy information
• Forms
  • NYS Tax exemption

• Travel Office staff
• Email
• Phone
• Individualized training
Tools to help

Contact Information

www.ubbusiness.buffalo.edu

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Thank you

Comment cards

Online evaluation

Contact us anytime

UB
Travel Services
2008