TRAVEL AUTHORIZATION REQUEST (TAR) INSTRUCTIONS

TAR MUST BE APPROVED PRIOR TO ANY TRAVEL BEING BOOKED

The URI Travel Procedures are on the Controller’s Travel website. The State-Approved Travel Agency processes all airfare, lodging and auto rentals. Domestic travel on Funds 401, 500 and 110 are not required to use the state travel agency and reasonable travel expenses with original receipts will be reimbursed after submission of TEV.

Please follow these instructions to avoid document or signature errors, which will cause a delay in expediting the TAR. A box will be available in room 103, Carlotti Bldg, Kingston campus and Room 111, OSEC Building, GSO campus to drop off TARs which need immediate review. TARs will be reviewed periodically each day. There is a check box on the TAR if the traveler wishes to be notified of the approved travel. Once the TAR is approved, reservations will need to be finalized. TARs will not be approved if there are outstanding advances or outstanding TEVs for prior trips.

Travel Email: travel@etal.uri.edu

For questions and more information, visit the Controller’s Travel website or contact:

<table>
<thead>
<tr>
<th>Name</th>
<th>Phone</th>
<th>Email</th>
<th>Notes</th>
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<tbody>
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<td>Ellen McVey</td>
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<td>Traveler last name: G-Ma</td>
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<td>Travel &amp; PCard Manager</td>
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<td>Doreen Bolster</td>
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<td><a href="mailto:doreen_bolster@uri.edu">doreen_bolster@uri.edu</a></td>
<td>Associate Controller, Accounting</td>
</tr>
</tbody>
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INSTRUCTIONS FOR COMPLETING TAR FORM

URI Affiliation – box should be checked if traveler is Faculty, Staff, Graduate Student, Undergraduate Student or other. An updated W-9 form should be filed with the TAR for anyone designated as other. Macros – must be enabled to generate a Verification Number.

SECTION 1 – REQUIRED INFORMATION

- **NAME** – First and last name of traveler
- **E-MAIL** – traveler’s and/or department contact person’s e-mail address
• **PS VENDOR ID NUMBER (not URI employee ID)** – the number given when entered into PS Financials. Only submit W-9 with the TAR if the traveler is not a Faculty, Staff, Graduate or Undergraduate student.

• **HOME ADDRESS** – mailing address of traveler where reimbursement will be mailed

• **URI EMPLOYEE DEPARTMENT** – name of home department where traveler is working (ie: Engineering, Pharmacy, Facilities, etc.)

• **4-DIGIT DEPARTMENT CODE** – department code that refers back to home department

• **DATES OF TRAVEL** – first day of travel to last day of travel

• **DESTINATION** – city, state, county, be specific

• **CAMPUS TELEPHONE** – In case there are any questions with TAR

• **NOTIFICATION CHECKBOX** – if traveler wants to be notified of approved TAR

• **PURPOSE OF TRAVEL** – be specific on the purpose of travel. Attach brochures, meeting agendas, conference highlights that may support the reason for travel.

**SECTION 2 – ESTIMATED EXPENSES**

This is an estimate and will vary from the final amounts on the TEV. **NOTE:** Complete all items that will be reimbursed to the traveler or paid directly by State Travel Agent or the PCard. Comments section is to explain any unusual requests.

- **Train** – contact Amtrak directly for an estimate

- **Air** – contact State Travel Agent for estimate; (fund 401, 110 and 500 are not required to use State Travel Agent)

- **Auto Mileage** – provide estimate mileage at the current rate

- **Taxis/Shuttles** – provide estimate

- **Registration** – conference fees should be paid by traveler, employee/department PCard or Invoice Voucher

- **Car Rental** – contact State Travel Agent for estimate and complete Rental Vehicle Justification Form
  - Enterprise\National Auto Rental is State Preferred vendor. Direct corporate billing, corporate rates and includes Collision Damage Waiver (CDW).
  - Additional information on insurance coverage can be found on URI Risk Management website including Rental Vehicle Policy and Auto Rental Insurance Form which must be completed no later than 4 business days prior to the start of the rental period.
  - If not utilized State Preferred vendor, cost of car rental collision or personal injury insurance is not reimbursable.

- **Lodging** – lodging can be reserved using State Travel Agent or employee can reserve hotel using a PCard or personal credit card

- **Meals and Incidental Expense Per Diem Rates** – per diem rates are from URI Travel Policy (no receipts needed). Exception for Foundation Fund 401. Federal per Diem rates are for Fund 500 only.
For State Funds, reimbursement will be based on a flat rate. The flat rate is based on departure and arrival times. There will be a $5 incidental expense per diem for gratuities paid for the following types of services: baggage carrier tip, hotel room cleaner tip, taxi driver tip, valet services tip and coat checker tip.

- If traveler’s scheduled departure time is before noon, they will receive $30.00 for the first day of travel.
- If traveler’s scheduled departure time is after noon, they will receive $15.00 for the first day of travel.
- All other days of travel will be at the rate of $30.00.
- If traveler’s arrival time is scheduled before noon, they will receive $15.00 for the final day of travel.
- If traveler’s arrival time is scheduled after noon, they will receive $30.00 for the final day of travel.

For Federal Funds, reimbursement will be based on the federal per diem.

- For the first day of travel, if the traveler’s scheduled departure time is prior to the normal business start time of 8:00 am, the traveler will receive 100% of the federal per diem. Otherwise, the traveler will receive 75% of the federal per diem.
- For the last day of travel, if the traveler’s scheduled arrival time is after the normal business hour of 5:00 pm, the traveler will receive 100% of the federal per diem. Otherwise, the traveler will receive 75% of the federal per diem.
- For all other days, meals are reimbursed in an amount not to exceed the standard (i.e. per diem) meal allowance.
- For purposes of the TAR form, departure time is defined as the time the traveler leaves their residence or the University (whichever is applicable) on the first day of travel.
- For purposes of the TAR form, arrival time is defined as the time the traveler returns to their residence or the University (whichever is applicable) on the last day of travel.

SECTION 3 – CHARTFIELD

List the chartfield(s) where the expenditures will be encumbered and charged. This amount should agree to the total estimated expenses above. If it does not agree, (limited funding) indicate so on the TAR. If additional lines are needed, list on the back of the TAR.

SECTION 4 – ADVANCE REQUEST

In some circumstances, employees or students traveling may be allowed cash advances if they don’t have a PCard to pay for the hotel, registration and other charges. Advances will not be allowed if the traveler has an outstanding advance or outstanding TEV for completed trips. For exceptions, see URI Travel Policy.

- **Date Required** – enter the date the advance is required (at least 2 weeks prior to travel)
- **Amount** – international for lodging & meals only and domestic for lodging only
SECTION 5 – REQUIRED SIGNATURES

- **Traveler** – traveler’s signature indicates they have read and understand URI Travel Policies
- **Department/Division Head** – (traveler cannot sign this line) required for all funds and person needs to be the traveler’s supervisor and have Signature Authorization for the chartfield; please refer to your individual college policies for required signatures
- **Principal Investigator** – required for Fund 500
- **Vice President/Vice Provost/Dean** – Vice President must sign for all Administrative Departments, Vice Provost must sign for all Deans; please refer to your individual college policies for required signatures.
- **Foundation** – required when using Fund 401
- **Office of Sponsored Projects** – is required when using Fund 500

**FAILURE TO FOLLOW URI TRAVEL POLICIES WILL DENY TRAVEL REIMBURSEMENTS TO THE TRAVELER. OUTSTANDING TRAVEL ADVANCES WILL BE CONSIDERED INCOME TO TRAVELER AND WILL BE REFLECTED IN YEAR END TAX REPORTS (W-2 or 1099)**