Dynamic Forms Travel Request Instructions
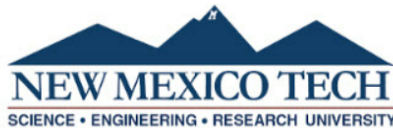
1. Please follow the link below to access the Travel Request Form: Travel Cover Page
   The Travel Request Form is also located on the NMT Travel Office web page:
   https://www.nmt.edu/finance/travel.php

2. If this is your first time using Dynamic Forms, create a new account using your NMT email address as your username (i.e. first name "." last name@nmt.edu).

3. If you already have an account, log in.

4. Enter the following information:
   a. The travel number will be filled in by the Travel Office.
   b. Select yes or no on whether you are the traveler.
   c. Select a contact person that the Travel Office can contact with any questions.
   d. Enter a funding department which is the department you are traveling on behalf of.
   e. Select where the trip will begin. If other, enter the departure address in the box provided.
   f. Select whether the travel is domestic or international.

5. A. Enter the city and state of the travel destination. B. Check the box if traveling to multiple destinations. C. Select the date of departure and D. date of return. **If the departure is within 10 days of the date the travel request is submitted, provide a reason for the late submission in the box provided.** *There is no guarantee for pre-payments, reimbursements or advances before travel departure if submitted late.*

6. Enter the purpose of the trip and how the trip will benefit NMT and/or the specific grant/contract being charged. Attach supporting documentation detailing the importance of the travel or conference such as a brochure, invitation, registration form, etc. If no

documentation is available, specify how information about the trip was obtained (letter, telephone, contract, etc.). Enter any special instructions/notes or attach any other documents the Travel Office may need to process the Travel Request.

Travel Justification

Provide the reason for the trip and demonstrate that the travel is necessary. Supporting documentation detailing the importance of the travel/or conference must be attached such as a brochure, invitation, registration form, etc. The reason **must** show the benefit to NMT and/or the specific grant/contract being charged. If no documentation is available, specify how information about the trip was obtained (letter, telephone, contract, etc.). Include the following:

Purpose and Benefits of Trip – Explain the reason for the trip, as well as benefits to your division and NMT

Attach Documentation: [Choose File] No file chosen
Files over 25 MB will not be accepted

Please include any special instructions:

Attach Documentation: [Choose File] No file chosen
Files over 25 MB will not be accepted

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7. Provide all that applies to your Travel Estimate.
    a. If applicable, select either NMT Per Diem, Board of Regents Rate or Federal Per Diem. The total reflects the first and last day reduction rules.
    b. If NMT Per Diem is selected:
        i. If Meals and Incidental Expenses is selected, enter the number of days/nights.
        ii. If Lodging is selected, choose whether it is in-state or out-of-state travel and enter the number of days/nights.
    c. If Board of Regents Rate is selected:
        i. Select either Physically Attending < 4hrs or Virtual **OR** Physically Attending > 4hrs.
    d. If Federal Per Diem is selected:
        i. If Meals and Incidental Expenses is selected, enter the number of days/nights along with the rate provided by GSA. The prorated amount will automatically be calculated.
        ii. If Lodging is selected, enter the number of days/nights along with the rate provided by GSA.
           For the GSA.gov site, click HERE.
        iii. The link to the GSA website is provided on the Travel Request Form for your use and information.
    e. If applicable, select Transportation and select all transportation that applies. Next, select the payment method and enter the rate or amount.
        i. If selecting personal vehicle, there is a drop down option that provides the standard roundtrip mileage from Socorro to multiple destinations in NM. You can use the miles provided and enter it in the miles input box.
    f. If applicable, select Registration, enter the name of the vendor being paid for the registration, the payment method and the amount
    g. If you anticipate any other travel expenses that were not listed above, select **Miscellaneous**, choose from the options listed or enter the description of the expense and the anticipated amount.
    h. Descriptions of the payment method selections are below:
        i. Select prepaid by traveler when the traveler has already paid for the expense and the receipt/proof of purchase is attached to the request.
        ii. Select NMT Purchase/Paid by University if expenses were paid by Direct Payment or Rio Grande Travel.
        iii. Select P-Card if the expenses were paid with a purchase card and the receipt/proof of purchase is attached.
        iv. Select Paid by Traveler During Trip if the traveler is planning on paying out of pocket for expenses. This would be an estimated amount.
8. **Please note**, if you have checked an expense box, selected a payment method and entered an amount and then want to delete that information, you cannot simply uncheck the expense box. You must delete each amount that you no longer want included and back your way out of the entry be **deselecting all of the information**. There will also be a "Reset" box available to check if you would like to reset the travel estimate portion of the form and start over. Only one reset will be allowed. If you need to start over again, please delete your current form and start a new one. You are also welcome to contact the Travel Office for assistance.
9. **Prepayments and Advances:**
    a. If the prepayment method of payment was selected, you have the option to be reimbursed the prepayment amount either before the trip or after the traveler returns from the trip.
    b. If there is an advance amount available, you have the option to request the allowed advance amount, an amount less than the available amount or you can enter zero if you do not want an advance payment before the trip.

☑ **Per Diem Rate** ☐ NMT Per Diem

☐ Board of Regents Rate:

Total Reflects First and
Last Day Reduction Rules

☐ **Federal Per Diem**

☑ **Hotel** `-- Please Select --` ▼

☑ **Transportation**

☑ Airfare `* -- Please Select -` ▼

Standard Roundtrip Mileage
from Socorro to:
`-- Please Select --` ▼

Miles:
`0`

☑ Personal Vehicle `* -- Please Select -` ▼

☑ Official Vehicle #: _____

☑ Car Rental `* -- Please Select -` ▼

☑ Fuel `* -- Please Select -` ▼

☑ Taxi/Shuttle `* -- Please Select -` ▼

☑ **Registration** Vendor Name: `*` _____ `* -- Please Select -` ▼

☑ **Miscellaneous** `* $ 0.00`

☐ Internet

☐ Parking

☐ Miscellaneous

Total Pcard `$ 0.00`
Total Prepayments `$ 0.00`
Total NMT Payments `$ 0.00`
Advance Allowed `$ 0.00`
Requested Advance
Amount `_____`
(Cannot Exceed Advance
Allowed Amount)

☐

Check to Reset
Travel Estimate
(Allowed Once)

10. Funding Source
    a. Distribution: select whether you would like to distribute the amount charged to the Index by percentage or dollar amount.
    b. Enter the Index.
    c. Select the Account code from the selection box.
    d. Enter Activity Code if needed.(If you are unfamiliar with this, please disregard).
    e. If multiple indexes are being used, select the Add More Rows checkbox.

Funding Source

Total Estimate: `$ 0.00`

Distribution:
`-- Please Select --` ▼

Index: `*` _____ Account: `* -- Please Select --` ▼ Activity Code: _____
Add More Rows? ☐

11. Receipts and Documentation
    a. Choose file box to upload any documentation (if applicable) that refers to the purpose of the trip.
    b. Choose file box to upload any receipts, i.e. airfare, registration, hotel reservation/confirmation, etc.
       Note: The preferred method of attachments is to combine all documents and receipts into one document before attaching to the form.

Receipts and Documentation

Upload Documentation/Receipts:

| Choose File | No file chosen | Choose File | No file chosen | Choose File | No file chosen |

Files over 25 MB will not be accepted *Files over 25 MB will not be accepted* *Files over 25 MB will not be accepted*

| Choose File | No file chosen | Choose File | No file chosen | Choose File | No file chosen |

Files over 25 MB will not be accepted *Files over 25 MB will not be accepted* *Files over 25 MB will not be accepted*

12. Requestor Signature

   a. Click to electronically sign the form.

The requestor and approving authorities certify that the above constitutes NMT business related Travel.

*
(click to sign)

Requestor Signature   Date

13. If the requestor is filling out the form on behalf of the traveler, the form will route to the traveler for electronic signature once submitted.

The requestor and approving authorities certify that the above constitutes NMT business related Travel.

*
(click to sign)

Requestor Signature   Date

*

Traveler Signature   Date

14. Supervisor, Dept. Division Head or P.I. **This request cannot be processed without their signature(s).**
   a. Please enter contact information of the Supervisor, Dept. Division Head or P.I. approving the Travel Request.
   b. If additional departments are required to approve the Travel Request, choose yes or no from the selection box and enter their information.
   c. **Please ensure the email address is entered correctly so the form will route to the authorized signer. If it is entered incorrectly, the form will not route until the email address is corrected.**

Please enter contact information for the form participant(s) listed below. **This request can not be processed without their signature(s).**

Supervisor, Dept. Division Head or P.I.:

First Name: *[   ]   Last Name: *[   ]   Email Address: *[   ]

Send to another department to concur?   -- Please Select -- ⌄

15. Submission and Saving Progress
   a. If at any point, you need to gather more information about the trip, scroll down to the bottom of the form and click Save Progress.
   b. When finished filling out the form, scroll down to the bottom and click the Submit Button. This will trigger the form to route for approvals.

[Save Progress]   [Submit Form]

16. Approvals

    a. Click to electronically sign the form, add comments if needed.

Approvals

Supervisor, Department Division Head or P.I.

*

_____ _____
Supervisor, Dept. Division Head or P.I.   Date
Signature

Comments:

[   ]

Travel Office

Comments:

[   ]

Route To:	☐	☐	☐	☐	☐
	SPA - Cost Accounting	SPA - Research Accounting	Business Office - Financial Operations	Other Accountant 1	Other Accountant 2

*

_____ _____
Travel Office Signature   Date

17. Once the Travel Request Form is received by the Travel Office, it will be reviewed and processed. If the Travel Office has any questions, requires corrections to be made or needs additional documentation, the Travel Office will return the form through Dynamic Forms back to the form initiator. Once the initiator re-submits the request form, it will then re-route to the approvers and back to the Travel Office for processing.

18. It is recommended to save a copy of the Request Form for reference when submitting the Reimbursement Voucher. You can download pdf copies through your Dynamic forms account under "My Forms".

19. If you have any questions or need help filling out the Travel Request Form through Dynamic Forms, please email the Travel Office at traveloffice@npe.nmt.edu.