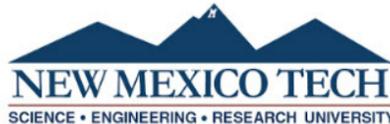




Dynamic Forms Travel Request Instructions

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: [NMT Travel](#)
2. The new SSO version of Dynamic Forms may be found here: [NMT Dynamic Forms Dashboard](#). Your username will be your Banner ID (900#) and Password. (This will be the same credentials that you use to log-in to your Admin Network Computer, Banner Application Navigator or Academic Labs, but NOT Banweb/Wireless). If your password does not work (or you do not remember it), it may be expired and you can visit the ITC Helpdesk in the Workman Gold Building. If you are off-campus or you need to contact the ITC Helpdesk for any other reason, you may contact the ITC Helpdesk here: help@nmt.edu / x5700.
3. 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.

A Travel Number: *



Travel Request Form

Date:

B
Are you the Traveler? *

C
Who should be contacted with questions? *

D
Primary Funding Department:

E
Travel Departure Point (Where will you begin your trip?): *

F
Is this travel Domestic or International? *

4. 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 ten (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.**

Destination: *	Date of Departure: *	Date of Return: *
<input type="text"/>	<input type="text"/>	<input type="text"/>
This field is required.	This field is required.	This field is required.
<input type="checkbox"/> Check for Multiple Destinations		

5. 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: No file chosen
Files over 25 MB will not be accepted

Please include any special instructions:

Attach Documentation: No file chosen
Files over 25 MB will not be accepted

6. 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. **Ensure you know what per diem is allowable on the Index you are traveling on BEFORE you travel.** You cannot split between NMT Per Diem and Federal Per Diem.
 - 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.
 - iii. If using Federal rates, the requester must print the Federal Meal & Incidental Expenses (M&IE) rates and Daily Lodging rates from the GSA website. This print out and calculation must be attached to the Travel Request Form. **NMT will not reimburse amounts in excess of maximum allowable Federal per diem rates without written agency approval prior to traveling so it is very important to know what those rates are and choose hotel accommodations at or below the maximum per diem allowed.**
 - iv. 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.
 - ii. When electing to drive to a destination versus flying, justification for driving and a comparison must be attached to the Travel Request.
 - iii. NMT will reimburse or pay the cost of commercial airline at the lowest available rate that meets business needs. (Will not reimburse preferred seating or early bird options).
 - iv. Tips will be reimbursed at up to 20% of the trip fare. Please do not calculate tips with taxes and fees included.
 - 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 Travel Agent.
 - 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.
7. **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 by **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.
8. **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. Prepayments to be made with NMIMT funds should be noted on the Travel Request form with all appropriate documentation attached (such as invoices, registration forms, calculation of advance amounts, etc.). Payments made by the traveler using personal funds prior to a trip (i.e. airline fare, registration) will be reimbursed at 100 percent. A copy of the registration and proof of payment and/or receipts must be attached. These payments will be processed when the travel request is received and approved. The traveler may also elect to receive all reimbursements upon completion of 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. Travelers may obtain up to a ninety (90) percent advance of the submitted expenses, less any prepayments, on trips requiring a stay of 24 hours or more.

- 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:

Personal Vehicle * -- Please Select -

Official Vehicle #:

Car Rental * -- Please Select -

Fuel * -- Please Select -

Taxi/Shuttle * -- Please Select -

Registration Vendor Name:

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	<input type="text"/>
<i>(Cannot Exceed Advance Allowed Amount)</i>	

Check to Reset Travel Estimate (Allowed Once)

9. 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. (710201)
- 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:

Distribution: -- Please Select --

Index: * Account: * -- Please Select -- Activity Code:

Add More Rows?

10. 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, etc. The receipts must include last 4 digits of the credit card used. Missing receipts is the most common reason for delay in reimbursement.

Note: The preferred method of attachments is to combine all documents and receipts into one document before attaching to the form as .PDF or .PNG ONLY.

Receipts and Documentation		
Upload Documentation/Receipts:		
<input type="button" value="Choose File"/> No file chosen	<input type="button" value="Choose File"/> No file chosen	<input type="button" value="Choose File"/> No file chosen
<i>Files over 25 MB will not be accepted</i>	<i>Files over 25 MB will not be accepted</i>	<i>Files over 25 MB will not be accepted</i>
<input type="button" value="Choose File"/> No file chosen	<input type="button" value="Choose File"/> No file chosen	<input type="button" value="Choose File"/> No file chosen
<i>Files over 25 MB will not be accepted</i>	<i>Files over 25 MB will not be accepted</i>	<i>Files over 25 MB will not be accepted</i>

11. Requestor Signature

- a. Click to electronically sign the form.

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

*

Requestor Signature _____ Date _____

12. 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.

*

Requestor Signature _____ Date _____

* _____

Traveler Signature _____ Date _____

13. 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: *	<input type="text"/>	Last Name: *
	<input type="text"/>	<input type="text"/>
Email Address: *	<input type="text"/>	
Send to another department to concur? <input type="button" value="-- Please Select --"/>		

14. 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.

15. 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

- 16. 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.
- 17. 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".
- 18. 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.