

Smart Center

Step by Step Guide

procedures before and after your travel



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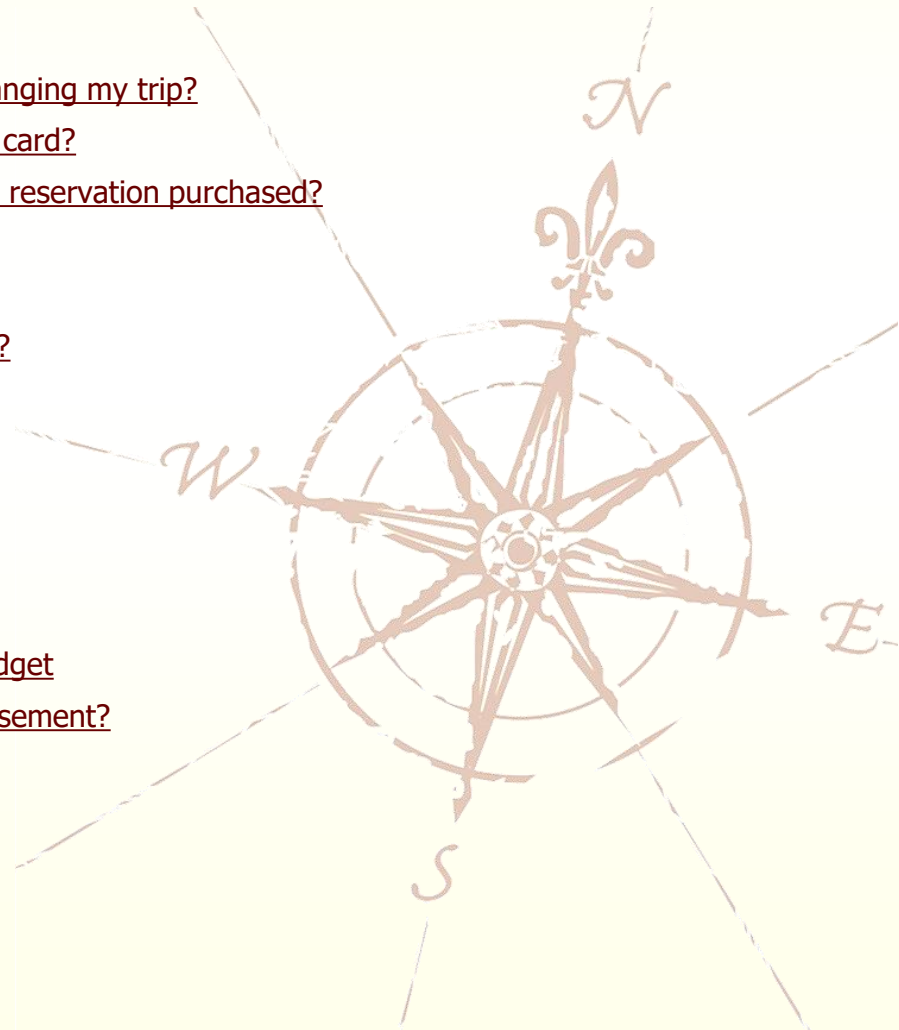
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What role does the Smart Center play when arranging my trip?

- ❖ **Keep in mind that the Smart Center does not make reservations for your trip.**
We process your UMD travel approval forms and can assist with making payments on your behalf.
- ❖ **We can only pay for airfare and train reservations through our 3 approved Travel Agencies.**
(You are welcome to purchase tickets through a website or other agency but you are responsible for retaining proper receipts for reimbursement. You cannot request reimbursement until after your travel is complete.)
- ❖ **If you would like our office to pay for your air/train fare please call one of our travel agencies to make your reservation.**
 - ❖ Globetrotter 301-570-0800 or 866-235-5467 after hours: 800-639-9278 (VIT#S9TX5)
 - ❖ Travel Leaders 301-403-4278 or 800-333-2115 after hours: 800-366-2100 (Code: 16XL)
 - ❖ Omega 877-403-4282 after hours: 800-285-6342 (Code: A5L9)
- ❖ **Let the agent know that your ticket will be purchased on the Smart Center's profile.**
- ❖ **Your ticket can be held for 24 to 48 hours (depending on the airline) until the electronic approval has been received for purchase.**
- ❖ **The agency can also reserve a hotel for you.**
- ❖ **Travel insurance policies are available through our 3 approved Travel Agencies.**
(Travel insurance policies cannot be reimbursed if you purchase from any other source)



What can the Smart Center pay using the travel card?

- ❖ **We can pay for airfare and train tickets through our 3 approved Travel Agencies.**
- ❖ **Our office can arrange payment of room and tax charges at hotels.**
(We cannot pay for incidental charges including meals, parking, or internet on our travel card.)
Please include the hotel contact information and your reservation information in the message section of the Travel Approval Request form.
- ❖ **We can pay for conference and registration fees.**
(We cannot pay for membership fees or any event costs that include the purchase of alcohol.)
Please print any forms needed and complete everything except the payment portion. We can then fax payment to the conference organizers.
- ❖ **We can pay for banquet and reception costs if your department is hosting an event.**
(We cannot pay for any purchase of alcohol regardless of funding source)
Please use our travel agencies' group and meetings departments. Our agencies are a valuable resource to organize events. If your event is going to require a contract or cost more than \$5,000 it helps simplify the process to have a University of Maryland approved vendor negotiating on your departments behalf. Contact our office if you have questions.
- ❖ **We can purchase travel insurance policies through our 3 approved Travel Agencies.**
Please include price & policy information in the message section of the Travel Approval form.



How do I get department approval and have my reservation purchased?

- ❖ Visit the [Smart Center Website](#) and complete a [Travel Request](#).
(Navigate to forms using the menu on the left)

- ❖ Please provide the name of the travel agency that is holding your reservation in the form (choose "other" if you did not use one of our agencies)
- ❖ Please be **specific** with your travel purpose (conference name, seminar/lecture topic, meeting subject, etc.).
- ❖ Include all anticipated expenses for your trip (include lodging, car rental, meals, ground transportation, conference fees, etc.).
- ❖ If you would like the Smart Center to arrange payment for room & tax charges at your hotel please provide the hotel name, telephone number, and reservation confirmation number in the message section of the request form (step 3).

Enter
traveler's
name here



Keep on eye on the left margin of the form for assistance with any errors.
Our helper, Dr. Smart, will let you know what information we need.

- ❖ Once you complete the Travel Request form the Smart Center submits your travel information to your department for approval.
- ❖ When the department electronically approves the request an email is automatically sent to the travel agency authorizing the purchase of the air or rail ticket.
- ❖ The travel agency will email E-ticket information to you. Please take this with you to the airport or train station.



Items to keep in mind before & during travel

- ❖ **Complete your Travel Request BEFORE your trip:**
You must submit a travel approval before any overnight trips. You run the risk of not receiving university approval upon return. The traveler will have to cover their own expenses in these cases.
- ❖ **Traveler affiliation:**
You must include the travelers email and affiliation for all travel requests and expense statements.
- Affiliation categories are: Faculty, Staff, Student (Not Education Abroad), Student Employee (Travel Related to Work)*, Other Traveler, & Volunteer / Affiliate
Student Employee (Travel Related to Work) should be used only when a student employee is traveling **for his/her job, not that they are traveling and also an employee.*
- ❖ **If this is international travel on a federally sponsored award** please see our information sheet for the new foreign travel procedures.
- ❖ **If the traveler is not a US Citizen** and visiting campus, please see the foreign visitor screening procedures.
- ❖ **Remember to keep all valid itemized receipts** (verifying payment) for the following: airfare, train fare, hotel, conference fees, auto rental, taxi, internet, parking, baggage fees, fuel (for rental cars), and any meal exceeding per diem. If you are not sure keep the receipt just in case.
- ❖ **Insurance on auto rentals**
 - ❖ Employees: **DO NOT** purchase any insurance for domestic travel, you will not be reimbursed for the cost. Employees may purchase CDW / LDW for international car rentals only.
 - ❖ Non-employees may be reimbursed for CDW / LDW only.
 - ❖ **LIS / PAI / PEI** coverage is **NEVER** reimbursable for any travelers.
- ❖ **Complete your expense statement quickly**
You must submit your expense statement in a reasonable amount of time (2 weeks ideally). If there is an extended delay (over 90 days) you will need to submit an explanation.



Combining personal & business travel

❖ **When combining personal travel with your business trip:**

- ❖ If you modify your business travel to include personal travel you must obtain a comparison itinerary showing the cost for airfare on just the business travel dates **before** you travel.

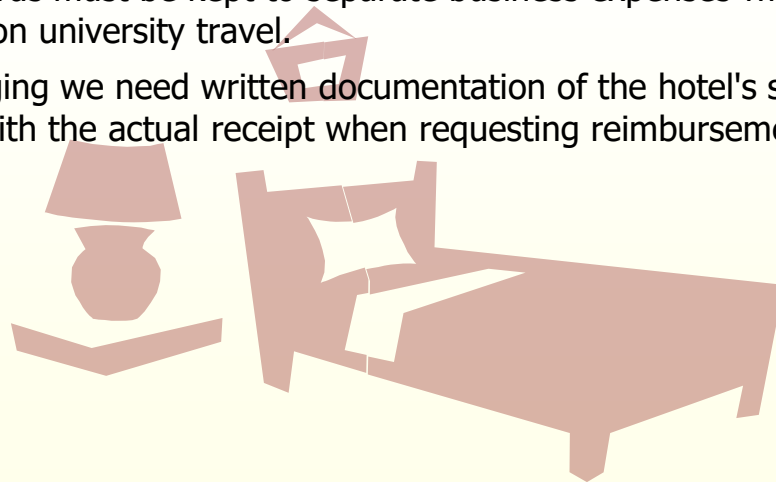
Please contact the Smart Center for detailed instructions (301) 405-8282 or bsossmartcenter@umd.edu

- ❖ Any additional costs incurred due to stopovers or route modifications made for the convenience of the traveler will be borne entirely by the traveler.

❖ **When traveling with non-UMD travelers:**

- ❖ UMD will not reimburse any expenses for travel companions unless the department approves their travel expenses prior to travel and documents that their travel is on behalf of the University of Maryland.
- ❖ Detailed records must be kept to separate business expenses when traveling with companions who are not on university travel.

For lodging we need written documentation of the hotel's single rate to be submitted along with the actual receipt when requesting reimbursement.

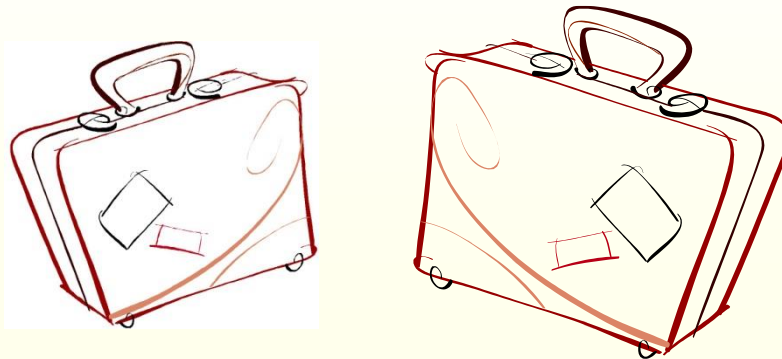


What if my plans change?

- ❖ **Always notify the Smart Center in writing of any changes to your trip.** Even when no payment arrangements have been made we still need to update your file. When payment arrangements have been made we need to document everything and ensure any credits or refunds are tracked and put back in the correct account. Please [email](#) our office right away when you have any changes.
- ❖ **Airline / Hotel Cancellation and Change Fees cannot be paid** except in cases of emergencies and for the convenience of University of Maryland. Please contact the Smart Center for assistance with these changes.
- ❖ If discounted tickets carry significant cancellation penalties departments should consider purchasing travel insurance through the university travel insurance vendor (Globetrotter).

The University of Maryland will not reimburse or pay for travel insurance other than that purchased through or 3 approved Travel Agencies.

- ❖ Be sure to consider and fully understand the airfare's applicable restrictions as well as change and cancellation penalties before accepting the itinerary. Such penalties are reimbursable only if your approving authority agrees that an itinerary change or cancellation is in the best interest of the university.
- ❖ The university cannot purchase or reimburse fully refundable fares without justification and prior approval by the department.



Once you return from your travel...

- ▶ Go to the Smart Center website, click on "forms" in the menu on the top, and fill out an expense statement
- ▶ Complete the form with your out of pocket travel expenses.
Do not include expenses already paid by the Smart Center or your department.
- ▶ Return the signed expense form to the Smart Center with all of your original receipts:
**BSOS Smart Center
7343 Preinkert Drive
0137 Tydings Hall
College Park, MD 20742
(301) 405-8282
bsossmartcenter@umd.edu**
- ▶ The Smart Center will then process the reimbursement and send the traveler a confirmation letter or expense statement once the reimbursement has been approved.



Expense Statement Checklist

- ❖ **Include your employment status, department, and contact information** (you or a designated contact person).
- ❖ **Remember to include all valid itemized receipts (verifying payment) for the following: airfare, train fare, hotel, conference fees, auto rental, taxi, internet, parking, baggage fees, fuel (for rental cars), and any meal exceeding per diem.**
- ❖ **Mileage can only be calculated using whole miles, no decimals.**
- ❖ **Enter only the meals that you are allowed given your times of travel.**
Do not include meals paid as part of lodging costs or registration fees.
- ❖ **Include proof of conversion rates.**
Valid proof: print-out from OANDA.com or xe.com that reflects the rate you used; receipt for the exchange rate; hotel or credit card documentation. Please DO NOT simply write down the rate you used without any back up documentation, this is not adequate proof. (If we cannot verify your conversion rate we will use our own which can result in a lower reimbursement)




What to look for in a receipt

❖ **Is it itemized? Does the receipt clearly show what products or services were purchased and the individual costs? (*highlighted in blue*)**

❖ **Does the receipt show payment was made, method of payment, and that there is no balance due? (*payment highlighted in yellow*)**

❖ **Is the receipt on letterhead or list enough vendor information to contact them if there were any questions? (*highlighted in red*)**

Helpful hints: Only use light yellow highlighter to accent a receipt or credit card statement. Other colors do not copy or scan well and information can be lost. Also be aware that tape (and highlighter) can cause thermal printed receipts to fade very quickly.



Manchester Grand Hyatt San Diego
 One Market Place
 San Diego, CA 92101 USA
 619.232.1234
 FAX: 619.233.6464

Guest Account

Room	Rate	Arrive	Depart	Folio No.	Account	Affiliation	FF	ID	Page
	213.00	06/19/09	06/22/09		2 CCARD	2-RSAL	11	KBE	1

Mr. John Doe 02:11

University of Maryland BXX 1/0

College Park, MD 20742

-01 75925 04/12

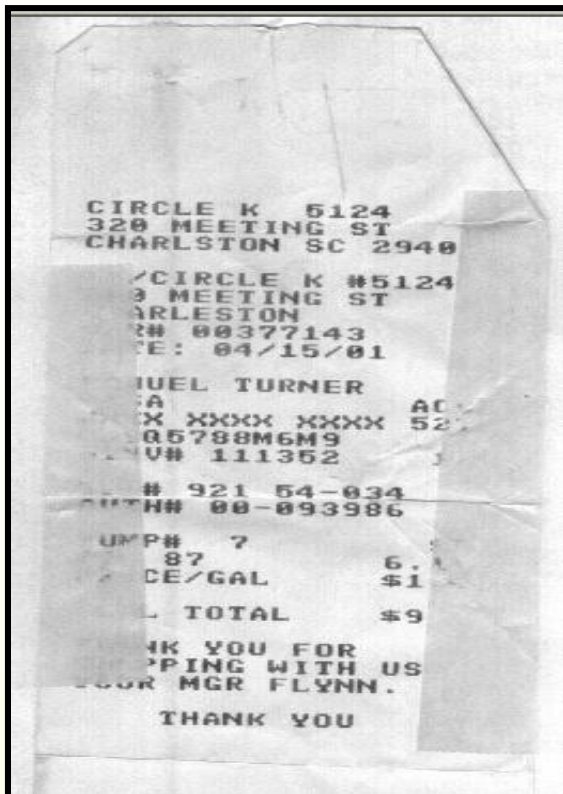
Date	Code	Reference	ID	Description	Charges	Credits	Balance	
0619	112	Rm 2176	DCC	GROUP ROOM	213.00		213.00	
0619	811	Rm 2176	DCC	*ROOM TAX	22.37		235.37	
0619	812	Rm 2176	DCC	*SD TMD ASSMNT	4.26		239.63	
0619	813	Rm 2176	DCC	*CA TOUR ASSMNT	.21		239.84	
0620	112	Rm 2176	AMA	GROUP ROOM	213.00		452.84	
0620	811	Rm 2176	AMA	*ROOM TAX	22.37		475.21	
0620	812	Rm 2176	AMA	*SD TMD ASSMNT	4.26		479.47	
0620	813	Rm 2176	AMA	*CA TOUR ASSMNT	.21		479.68	
0621	112	Rm 2176	DCC	GROUP ROOM	213.00		692.68	
0621	811	Rm 2176	DCC	*ROOM TAX	22.37		715.05	
0621	812	Rm 2176	DCC	*SD TMD ASSMNT	4.26		719.31	
0621	813	Rm 2176	DCC	*CA TOUR ASSMNT	.21		719.52	
0622	932	Ex04/12	KBE		75925	-719.52	.00	
TOTAL								.00

MASTERCARD

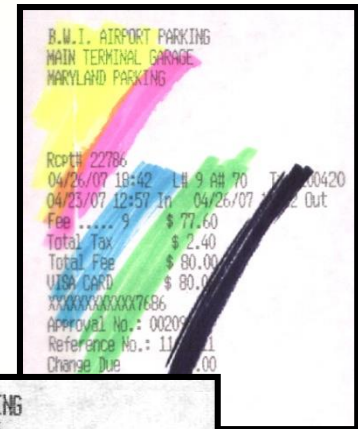
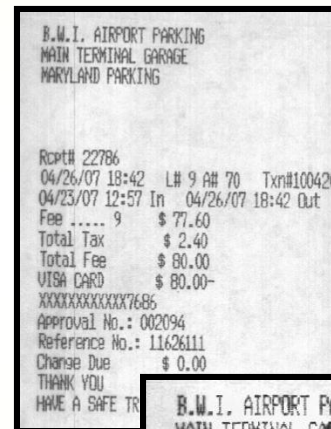


Tips to preserve your receipts

- ❖ Be careful when using tape or highlighters on thermal receipts. Tape causes the printing to disappear as can highlighter ink. The edges of this receipt have been taped and the printing underneath has disappeared.



- ❖ Only use light yellow highlighter when possible on documents. Here is a parking receipt showing various color highlighters. The darker colors obscure information once the receipt is copied or scanned. All 3 images are the same receipt.



The Expense Statement (part 1)

Double check your account #, SSN, and name spelling

Provide your address, contact information, and detailed travel purpose.

In this grid list each day's expenses in a column. List the cost next to the appropriate category.

For example:
On 1/8/19 there is a \$12 lunch & \$33 taxi

SMART CENTER
TRAVEL REIMBURSEMENT
REQUEST

Is Individual on UMCP Payroll at the time of reimbursement?
 Yes No Student

Department:
TAR#
Date: 1/15/2019

KFS Account Number	Social Security Number +	First Name and Middle Initial	Last Name

+ Social Security Number MUST be provided. If not applicable, please provide immigration status with visa and passport number

Home Street Address and Apartment #:
Home City, State Zip Code:

Home Telephone:
Work Telephone:
E-mail Address:

*Contact person's name, phone number, and e-mail (when applicable):
 *This is the person who will be contacted if there are any questions about the receipts, expenses, itinerary, etc.

Purpose of Travel:

EXPENSES

Date (mm/dd/yy)	1/8/19	1/9/19						
Breakfast ^								\$0.00
Lunch ^	\$12.00							\$12.00
Dinner ^								\$0.00
Lodging *								\$0.00
Taxi/Metro/Bus*	\$33.00							\$33.00
Air/Rail *								\$0.00
Auto Rental *								\$0.00
Parking Fees*								\$0.00
Tolls*								\$0.00
Telephone/internet*								\$0.00
Registration Fees *								\$0.00
Gratuities (non-meal)								\$0.00
Other:								\$0.00
Other:								\$0.00
Other:								\$0.00
Private car mileage (whole numbers)						48	Miles at	\$ 0.58
TOTAL EXPENSES								\$72.84

^ Only meals listed will be reimbursed and only up to the allowable per diem rates. Meal costs include related gratuities. Meals provided at the event or inflight are not reimbursable.

* Original Receipts must be obtained for all expenses not covered through Per Diem.

* Please do not attach receipts for expenses not being requested. Do not list expenses paid by UMD.



The Expense Statement (part 2)

ITINERARY

(mileage will be checked using Google maps)

*Please complete times of travel and destinations for all travel

Date (mm/dd/yy)	1/8/19	1/9/19							
Start Time	8 am								
End Time		3 pm							
From	UMCP	MCO							
To	BWI	BWI							
To	UMCP	UMCP							
Auto Mileage	24	24							48

By signing this request, I acknowledge all expenses are appropriate for UMD reimbursement.

Traveler's Signature

Date

The UMD Travel Expense Statement will be mailed for final review/signature once expenses have been approved for reimbursement.

bsosmartcenter@umd.edu

Mailing Address: BSOS Smart Center; 7343 Preinkert Drive; University of Maryland; College Park, MD 20742

Location: 0137 Tydings Hall; University of Maryland; College Park, MD 20742

Revised January 2019

Retain a copy for your records

On the bottom portion of the expense statement you will list your travel itinerary and mileage driven. (as listed inside the green box)

Last but not least... Remember to sign the form! We cannot process your reimbursement request without your signature.

Return the completed form and all receipts to the Smart Center



Budget limits, meal rates, & mileage

❖ Request authorized amount

If there is a limit on your total trip cost or reimbursement total please do not submit expenses in excess of that figure.

❖ Current domestic meal per diem

Breakfast	\$10.00
Lunch	\$12.00
Dinner	\$25.00

* **travel time: must depart at least 2 hours before & return two hours after meal to be eligible for reimbursement**

❖ International meal rates can be found on the [State Department Website](#)

The **M&IE** rate should be entered in your expense statement:

Breakfast 15% of daily rate (ex: \$100/day M&IE rate = \$100 * 15% = \$15 breakfast per diem)

Lunch 25% of daily rate

Dinner 60% daily rate

❖ Mileage rate - only enter whole miles, no decimals

\$ 0.545 per mile (effective for travel during 2018)

\$ 0.58 per mile (effective for travel beginning January 2019)

❖ Mileage calculation

Mileage is measured from the closer of the duty station or point of departure to destination and return for travel on days during the employee's normal work schedule. For travel on days that are not part of the employee's normal work schedule, actual mileage driven is reimbursable.

Example: When traveling to BWI airport on a Tuesday that you would normally report to work mileage should be calculated from your office location to the airport unless your origin (home) is closer to the airport. On Saturday (if you would not normally work on a Saturday) actual mileage traveled is appropriate.



How does the Smart Center process my reimbursement?

- ❖ **Once we have reviewed your expense statement and receipts we check the totals against your original Travel Approval. If there are any significant changes we amend the Travel Request Form and send it to the department to approve.**
- ❖ **If there are no changes (or after the amended Travel Request is approved) we process an Electronic Expense Statement which is sent on for Dean's Office review and approval.**
- ❖ **Employees will receive a printout of the Electronic Expense statement in campus mail to review, sign, and return for our files.**
- ❖ **Non-Employee will receive a letter and a copy of their expense statement explaining that their paperwork has been sent to Accounts Payable for further review and processing. Their check will be issued by the State of Maryland.**
- ❖ **Click [here](#) for a detailed explanation of how you will receive your reimbursement.**



Contracts and meetings

- ❖ **Individuals are not authorized to enter into any contract on behalf of the university.**

All contracts need to be reviewed and signed by Travel Services before any payment is made.
- ❖ **We cannot pay for any alcoholic beverages regardless of funding source.**
- ❖ **When possible, it is best to work with our travel agencies to find a vendor and negotiate all contracts or meetings, especially when costs exceed \$5,000.**

We can make purchases above the \$5,000 delegated purchasing limit with our approved agencies so it reduces the departments documentation burden. When we use one of our agencies they know the university policies and can steer the contract process away from unallowable clauses.
- ❖ **If you are not working with one of our travel agencies we will need a copy of the contract to forward onto Travel Services along with any additional documentation that might be needed.**
- ❖ **In order to process a contract we will need a Travel Approval Request completed and an expected list of attendees.**

If the list is too long to fit in the comments section of our form feel free to email it to our office at bsossmartcenter@umd.edu .
- ❖ **Be sure to allow enough time to complete contract review and negotiations.**

Travel Services asks for a minimum of 2 weeks to review a contract. During busy times of the year and right before breaks please allow extra time for the review. Keep this in mind when setting up payment schedules and deadlines with the vendor.





Campus links for more information

- **Department of Business Services**—Travel Services
<http://www.dbs.umd.edu/travel/>
- **Department of Business Services**—Travel Services “Traveler’s Guide”
http://www.dbs.umd.edu/travel/policy/umtravel/trav_guide.php
- **Department of Business Services**—Travel Discounts
Provides a list of corporate discounts provided to University of Maryland affiliates.
<http://www.dbs.umd.edu/travel/discounts/index.php>
- **UMUC Marriott Reservations**
Visit this link for information regarding UMUC reservations & corporate discount codes.
<http://www.dbs.umd.edu/travel/discounts/umuc.php>
- **Motor Transportation Services at the University of Maryland**
The Motor Transportation Services unit of the Department of Business Services offers a wide variety of transportation-related services to the university. The goal of Motor Transportation Services is to provide the university community with quality, convenient and cost-effective vehicle services.
<http://dbs.umd.edu/motor/>
- **ORAA Foreign Travel Approval Tools** include:
[Toolkit for Review and Approval of Foreign Travel on Sponsored Projects](#)
[Fly America-More Than Just A Name \(pdf\)](#)
[Use of United States Flag Air Carriers \(pdf\)](#)
[Fly America Act Waiver Checklist](#)
- **ORAA Visitor Screening System**
<http://www.umresearch.umd.edu/ORAA/screening/>



Smart Center

7343 Preinkert Drive

0137 Tydings Hall

College Park, MD 20742

Phone: (301) 405-8282

Fax: (301) 314-7960

Email: bsossmartcenter@umd.edu

Website: www.bsos.umd.edu/faculty-staff/smart-center

