NAU TRAVEL: COST COMPARISONS – How-To Run

POLICY EXPECTATIONS

The following travel arrangements will require a cost comparison if deviating from university policy.

Please reference the <u>full associated travel policy for cost comparison requirements</u>, **the below is only a quick reference.**

<u>Lodging Rates over Allowable Rate Schedule, SAAM or DoD</u>: *Policy ref.* TRV535 sec. B-3.
If a traveler is requesting lodging accommodations above the State of Arizona Accounting Manual (SAAM) and/or Department of Defense (DoD) allowable rate, a *Policy and Compliance Review (PCR)* is required from the Comptroller's Office prior to booking **and** *cost comparisons must accompany the request*.

<u>Personal Vehicle use Out-of-State</u>: *Policy ref.* TRV525 sec. E-6b.
If a traveler is taking a personal vehicle out-of-state for their convenience, the university will only reimburse the lesser of actual miles driven or the cost of a round trip flight from a common carrier airlines. Cost comparisons are required.

<u>Combining Business and Personal Travel</u>: *Policy ref.* TRV525 sec. H-2.
If a traveler combines personal and business time and seeks reimbursement for transportation expenses, specifically airfare to and from the business destination, cost comparisons that fit the business need are required.

DOCUMENTATION REQUIREMENTS & RESOURCES

"More Cost Effective"- You must **show**, not merely tell, that travel arrangements are more cost effective; this can include completing cost comparison calculations *or* running cost comparisons using a travel search engine. Below are examples and things to note when creating your *cost comparison support documentation*.

Resources:
- Travel Search Engines – Kayak, Travelocity, Hotels.com, etc.
- Vehicle Expense Rate Calculators – Fleet Services & Comptroller's Office websites

What to Run/Capture: *see the 2nd & 3rd page for examples*
- Show **date, time <u>and</u> destination(s)** for the **business need** of the trip.
- Show the **vendors and/or *different arrangements*** you are comparing.
  - Include things such as round-trip v. 1-way flights, ticket class, type of room, location or proximity to traveler's business or event, etc.
- Show the **date & time** comparisons were run**.** This can be done by using the snip tool and capturing the full browser page and date/time in the lower left of your computer screen – *see example on pages 2 & 3*.
- Be sure to indicate on the cost comparison *which* option was selected - flight, lodging establishment, etc.
- If you *don't* choose the most cost-effective option, detail in writing why – highlight specific business needs or other issues with the listed comparisons; what is the WHY?
  e.g. *closest lodging had bad reviews, some service(s) not being provided (free parking and/or breakfast, etc.), too many layovers, arrival/departure times don't fit your business need, etc.*

NOTE! We cannot proceed with a traveler's reimbursement until the above documentation has been received!

COMPARISON TIMELINES

REQUIRED: Run a minimum of (2) weeks prior to departure **<u>OR</u>** when the rest of the travel arrangements are being reserved/booked, whichever occurs first.

Comparisons run day of departure or post-travel are not acceptable/usable for audit purposes and will not be included with the Expense Claim.

CONTACTS & RESOURCES

For additional assistance please contact your department's assigned Travel Specialist/Coordinator, or one of the below Travel Assistant Managers.

Reimbursement Processing Support Unit - NAU-Travel@nau.edu
Academic Department Travel Assistant Manager: Melinda.Miller@nau.edu, 928-523-3250
Administrative Department Travel Assistant Manager: Nicholas.Sanchez@nau.edu, 928-523-9422

CAPTURE - AIRFARE:

- Search engine used
- Type of flight: round-trip v. 1-way
- How many passengers?
- Type of Ticket: Economy, main cabin
- Departure & Destination: City, State or City, Country
- Flight Dates
- Vendor and Flight Information – do these flights meet the business need?
- How much do they cost?
- When were the comparisons run – date and time?

CAPTURE - LODGING:
- Search engine used
- Destination: City, State or City, Country
- Vendor(s)/Property full name
- Check-in and Check-out dates <u>AND</u> number of rooms/travelers in each room
- What is the nightly rate?
- When were the comparisons run – date and time?

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