

# EXHIBIT J FORM

A step-by-step guide

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ECOSYSTEM SCIENCE & SOCIETY

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# TOP SECTION

Download [the Exhibit J form](#) in Microsoft Excel. To begin, enter the information required in the top section of the form:

NORTHERN ARIZONA UNIVERSITY TRAVEL EXPENSE SUMMARY		Exhibit J Revised 4/17/2017	TA # Cash Advance #	Expense Report #	Page 1
Prepared by:	John Sample	Date:	1/7/17	Traveler:	John Sample
Entered By:	Maria Galvez	Department:	Ecosystem Science and Society	Emplid #:	8492587
Purpose of Travel/Description:	Travel to Healy AK Field sites for research	Destination:	Healy AK	Phone:	523-8344
Traveler's Home Address:	N/A	Traveler Duty Post:	NAU Flagstaff	County:	Denali Borough
		Comments:	1009999	State Vehicle	
				Rental Vehicle	
				Personal Vehicle	
				Dr. License #	

Prepared by: [YOUR NAME]

Date: [TODAY'S DATE]

Entered by: [Maria Galvez]

Date: [LEAVE BLANK]

Purpose of Travel/Description: [EVENT OR PURPOSE]

Traveler's Home Address:

*If requesting mileage:* [YOUR HOME ADDRESS]; if not: [N/A]

Traveler: [YOUR NAME]

Department: [Ecosystem Science and Society]

Destination: [YOUR DESTINATION]

Traveler Duty Post: [NAU Flagstaff]

Emplid #: [YOUR EMPLOYEE ID]

Phone: [523-8344]

County: [COUNTY OF DESTINATION] \*\*\*NOTE: COUNTY, NOT COUNTRY

Comments: [PROJECT ID #/NAME]









## PAGE 2 OF EXHIBIT J

If traveler is requesting mileage, input the number of miles under either Odometer or Map on page 2. Mileage may be calculated by one of the following methods:

- i. Actual mileage log with odometer readings and specific addresses
- ii. Printed copy of another method such as Mapquest.com web site or Google Maps

If traveler leaves from residence rather than regular duty post (NAU Flagstaff), calculate the mileage for the most direct route from NAU Flagstaff to traveler's home address and input to cell that says 'Enter Commute Miles Here->'. When traveling on university business and travel begins or ends at the individual's residence, reimbursement for mileage is computed as the mileage for the most direct route to the destination less the commute mileage to or from the regular duty post (NAU Flagstaff). The spreadsheet automatically calculates the reimbursement with these two inputs.

Additional details are required if there are any irregularities with the travel, including any third-party payments, traveler not requesting M&IE or lodging, exceptions to policy, etc. Reimbursement will not be made for personal travel or travel that could be construed as a possible conflict of interest. Documentation solidifying the business purpose of the trip should be attached to the travel claim if there is any question.

Per CMP 420-01, faculty and staff are required to properly account to NAU for the expenses within a reasonable period. Requests for reimbursement of travel related expenses should be *within 5 days of return* but no longer than 30 days after the return.

## ATTACHMENTS TO PROVIDE

A detailed invitation, brochure, agenda, itinerary, email communication with the event coordinator, etc. must be submitted to the travel specialist and attached to the Exhibit J. This documentation must substantiate university business and include information regarding the beginning and ending dates, registration fees, lodging costs, included meals and program itinerary. Actual lodging expense is reimbursed including all related costs such as rent, electricity, gas, water, and standard telephone charge up to the maximum reimbursement rate. Original receipts are required for all charges requested for reimbursement. Most importantly, provide documentation/receipts for all expenses listed on the Exhibit J (excluding M&IE).