

UCAR FINANCIALLY SUPPORTED VISITOR (NON-PAYROLL) (V2)
FORM INSTRUCTIONS

DEFINITION: Financially supported visitors (V2) are not on the UCAR payroll but receive financial support from UCAR in the form of a temporary living per diem, travel reimbursement, health insurance benefits, or whose home institutions are reimbursed for their full or partial salaries. These visitors are not UCAR employees.

NOTES:

- This form is to be used in lieu of the traditional Travel Authorization form. Do not fill out a TA form if you are completing the V2 form.
- Do not include visa fees on this form.
- For easier identification, please highlight any change/revision information on form before sending to HR or Travel. The highlight function works on the spreadsheet.
- Individuals participating in conferences, workshops, colloquia, seminars, tutorials, etc., are not considered "Visitors" under the V2 definition listed above. Please see UCAR Travel Procedure 3-1-6.

PURPOSE: These instructions will assist you in completing the UCAR Financially Supported Visitor (Non-Payroll) Form. This form must be completed for all new appointees, and revisions or extensions of current appointees. The majority of the form can be filled in using Excel and signatures may be required.

SECTION I: APPOINTEE DATA

Name (Last name, First name): Enter full name of the appointee. Please type or print legibly.

Gender: Indicate appointee's gender.

Dates of Appointment: Enter effective dates of:
Visit Dates: Original begin and end dates of visits
Amend Visit Date(s): Amend original visit date(s).
Revision Dates for other change types: Effective dates of changes other than the original effective dates. For example, effective date of a Host Division or UCAR Location change.

NCAR Strategic Goal Code: Enter the NCAR strategic goal code for the NCAR visitor that most closely matches the primary reason for the visit. Only one code may be selected per visit. These codes are abbreviations for the full NCAR strategic goals and priorities found in the NCAR Strategic Plan at <http://www.ncar.ucar.edu/>. The abbreviations as they relate to the strategic goals are as follows:

- 1 **Science** - Improve understanding of the atmosphere, the Earth system, and the Sun.
- 2 **Societal** - Increase societal resilience to weather, climate, and other atmospheric hazards.

- 3 Education & Diversity** - Cultivate a scientifically literate and engaged citizenry and a diverse and creative workforce.
- 4 Tools & Services** - Provide robust, accessible, and innovative information services and tools.
- 5 Observational Facilities** - Provide world-class ground, airborne, and space-borne observational facilities and services.

This information will be used to provide statistical data about the NCAR Visitor Program.

Access Card Required? Is an access card required for this appointee? If so, check "Yes" and complete the Card Access Form (http://www.fin.ucar.edu/forms/HR/access_form/access_form.shtml)

Does foreign appointee require Health Insurance? If Yes, include account to which the premium will be charged. Review this web site for additional information (<http://www.fin.ucar.edu/hr/foreignvisitors/insurance.html>)

Is this a Student Visitor? Please indicate whether this visitor falls within the Student Visitor category. UCAR Policy 2-2-3: "UCAR may appoint students enrolled in a degree program to collaborate on a UCAR project and enrich their academic experience. "

Home Institution Data: Enter the full name of appointee's home institution, street address, city, state and country (if not US). This is mandatory for all appointees with a home institution. If unaffiliated, enter "Unaffiliated" for the Home Institution Name and enter the home address. (UCAR/NCAR/UOP cannot be listed as a home institution.)

Appointee's Work Location Data Complete only if the appointee works outside of UCAR/NCAR/UOP facilities.

UCAR Location Data: **Host Name:** Enter host's name
Host Division(s)/Program(s): Indicate the primary division/program and lab responsible for this appointee. Additional fields are available for split appointments.
UCAR Location: Enter appointee's building location, room, and phone extension if appointee is at UCAR's Boulder facilities.
Visit Coordinator: Enter person completing this form and making arrangements.

SECTION II: APPROVAL SIGNATURES

Have the appropriate official sign the form and assign the appropriate account key(s) for which he/she is signing.

If foreign travel is included in this form, the appropriate official must sign authorizing the travel.

View the Signature Authority web site for additional information:
<https://www.fin.ucar.edu/SignatureAuthority/displayMainMenu.do>

SECTION III: DISTRIBUTION

Host distributes original copy to Human Resources and a copy to Travel. Human Resources distributes data to Today@UCAR, Mailroom, Reception, and Switchboard.

SECTION IV: HUMAN RESOURCES USE ONLY

To be completed by HR department along with the section below Section IV.

SECTION V: TRAVEL EXPENSE DESCRIPTION & AUTHORIZATION

Enter the following information to determine the total cost of the upcoming appointment.

Is home institution continuing compensation? Indicate if appointee is being compensated by their home institution.

Travel Account key & percent: Provide the UCAR account key and percent allocation for travel expenses.

Travel Visitor ID #: A unique visitor ID# is available through UCAR's on-line Travel application (<http://www.fin.ucar.edu/travel/index.html>). Click on "Online Travel" under the "For TA Numbers" heading. Login using the UCAR login and password. Click on "Create a Traveler" under the "Travelers" heading.

Visitor Authorization # (VA#): Obtain a Travel Authorization number through UCAR's on-line Travel application (<http://www.fin.ucar.edu/travel/index.html>). Click on "Online Travel" under the "For TA Numbers" heading. Login using the UCAR login and password. Click on "Create a Trip" under the "Trips" heading.

Travel Expenses: Enter appointee's estimated travel expenses. Note: Appointee's family travel expenses allowed for visits of 12 months or more.

Expenses include: Air Fare, Private Auto, Per Diem (not TLPD), Lodging (not TLPD), Miscellaneous, Rental Auto.

Shipping Allowance: Enter the appointee's estimated shipping allowance. Not to exceed \$750.

Other: Enter any other expenses associated with this appointment. If more than one item is listed, provide details in the "Notes" field. Any amounts listed in this area will be encumbered against a VA#, if one exists.

Temporary Living Per Diem (TLPD) The host laboratory or program may choose to pay Temporary Living Per Diem (TLPD), a combination of lodging and per diem. Payments are initiated through the V2 form rather than the Voucher form used for separate lodging and per diem. TLPD payments occur automatically once per month, and may not exceed the total rate of lodging and M&IE (Meals and Incidental Expenses) for the city of visit. TLPD is normally not paid for visitors with less than one month appointments.

Total Costs: Add up the expenses to determine the total cost of the appointment.

Itinerary: Enter the place of Origin and Destination of the travel.

Travel Dates: Enter the specific dates of travel.

Amended Travel Dates: Enter amended dates of travel.

Advances:

Housing: Enter the amount provided as an advance to the appointee for housing expenses. Housing advances will be deducted from TLPD or paid through a voucher (attached to this workbook).

Travel: Enter the amount provided as an advance to the appointee for other expenses. Enter cash advance amount and date the advance is required.

SECTION VI: TEMPORARY LIVING PER DIEM (BY MONTH)

Enter the temporary living per diem amount per month for the duration of the appointment. If this is a revision or extension, per diem needs to be calculated from the appointee's original appointment date. The total per diem listed must equal the total temporary living per diem item in Section V.

SECTION VII: TEMPORARY LIVING PER DIEM QUESTIONNAIRE

This section must be completed by the appointee. Questions 1 and 2 must be answered. If an appointee's appointment is one year or greater, appointee must complete questions 3 through 7. Responses to these questions will determine the appointee's eligibility for temporary living per diem. In accordance with IRS regulations, TLPD may be taxable as compensation if duplicate living expenses cannot be validated.

11/1/2007