**Step by Step Travel Instructions**

***Requesting, Booking and Payment for Travel***

1. Gather information for your trip: Email communication, conference web page, or flyer.
2. Allow adequate time for approvals and travel arrangements. For in state travel: a minimum of 3 working days is required. For out of state travel: a minimum of 5 working days is required. Any travel requested inside these time frames may be an out of pocket expense, subject to reimbursement as outlined in the OSUIT Travel Policy.
3. Speak with your supervisor and obtain verbal permission to travel.
4. Complete online Off Campus Trip Request: (This should be completed for all travel. In state, out of state, day trips with use of POV or GOV. Use Google Chrome or Firefox to complete the form. <https://ostatemailokstate.sharepoint.com/sites/OKM/FiscalServices/Lists/OffCampus%20Trip%20Request/AllItems.aspx> , using information from your email communication, conference webpage or flyer.
   1. Click **+New** at the top left of the page to open a new request.
   2. If more than one person from the same department is going on the trip, one form can be completed. Please put the names of the travelers separate by commas, and include CWIDS for all travelers, separated by commas in the same order as the names above. **You must include the CWIDs for all travelers!**
   3. If you are traveling in a group but have different supervisors and fund numbers, separate requests must be completed. If someone in the group will arrive later or leave before the rest of the group, a separate request must be completed for that traveler.
   4. Enter first name, last name.
   5. Enter a descriptive title of your travel.
   6. Destination: City and State.
   7. Enter the departure & return date and time. This is mandatory information that is needed to efficiently process your request.
   8. Enter the name of the designated driver Last Name, First Name and click the person with a check mark icon. The name should populate in the field. If not, you will need to click the book icon, and search by last name, first name and select by the email.
   9. Driver’s license expiration date.
   10. Choose yes if it is an out of state trip. No, if trip is in Oklahoma.
   11. Pick which transportation you will need.
   12. Choose yes if you will need lodging. (If you have a specific hotel to stay at, enter the information in the drop down box when you click yes. If not, enter address of destination and a hotel close to that address will be booked. Hotels will be booked based on designated lodging or the GSA rate.)
   13. No, if you won’t need lodging.
   14. Enter emergency contact name and number. If traveling with a group, the best practice is to leave emergency contacts with the Administrative Assistant and use the Administrative Assistant and their cell phone as the emergency contact.
   15. Select if you will need airfare or rental car.
   16. If using a departmental vehicle, enter the number.
   17. Enter estimated expenses. This will give your supervisor an idea of the cost of the trip and it is information I need to process your travel efficiently. Per Diem rates can be found at <https://www.gsa.gov/travel/plan-book/per-diem-rates> .
   18. Enter any comments you have concerning the trip in the Traveler Comments box.
   19. Enter applicant’s name. Last name, first name, and click person w/check icon.
   20. Enter cell phone number.
   21. Any additional comments can be added in Applicant comments.
   22. Enter Banner fund number. Make sure it is correct!
   23. Enter your supervisor. Last name, First name and click person w/check icon.
   24. Scroll down and submit form. Do not adjust anything under END OF FORM. That is for supervisor and Fiscal Services approval and motor pool use.
5. Forward the email communication, a link to the website, or a scanned copy of the brochure concerning your travel to the Financial Analyst in Purchasing. This documentation is needed to complete your travel plans. It is the traveler’s responsibility to provide this to the Financial Analyst to assist in booking your travel. It should include information on the conference such as location and dates, an agenda or training schedule and hotel information if there is a designated hotel. For those traveling on recruiting trips, these items generally won’t be needed.
6. For out of state requests, you will receive an email from AIRS for you to approve the out of state portion of your request. Click on the link provided in the email or go to [www.airs.okstate.edu](http://www.airs.okstate.edu) . Log in using your OKEY information if prompted and then click on the suitcase travel icon. Click on Awaiting approval and then Process next to the trip request. Select approve and then save. For in state travel only, the sharepoint request needs to be approved by the immediate supervisor and Fiscal Services. Out of state travel requires an initial request approval in Sharepoint and a second approval in AIRS. The Purchasing Office enters the request into AIRS.
7. **Travelers and Approvers—Approve requests in a timely manner!**
8. Conference registrations are done through the department with a P-card or through the Corral. Registrations are only paid for by Purchasing if a group is attending and the amount goes over the P card limit. If that is the case, the information should be forwarded to the Financial Analyst in Purchasing and they will book the registration for all attendees.

Registration should be done once you have an approved request. Sharepoint for In State and Sharepoint and Airs for out of state.

Per P-Card Guidelines: Conference registration may be prepaid / paid in advance if the following three (3) criteria are met and documented. The OSU Prepay Conference Registration form can be found here: <https://osuit.edu/purchasing/travel.php>

* A discount for early registration must be received
* If the registered participant cannot attend, someone else may attend in his/her place.
* If the conference is cancelled, OSU will receive a 100% refund.

OR

* Prepayment is required in order to attend the conference and
* No other form of payment is accepted.

Once all of the requests needed have been approved, the Financial Analyst will book your travel based on the information included on the requests and conference/meeting documents that you have sent to them.

1. Hotel requests will be booked based on conference rate information within the documentation provided. If a hotel is needed for recruiting and there is no conference information or designation lodging, a hotel will be booked based on the GSA rate and the information provided for the hotel in the online trip request submitted. The confirmation email will be forwarded to you.
2. If a flight is needed, the Financial Analyst will search a range of flights based on the travel dates and times entered in the online trip request. They will send a screen capture of the least cost available flights for the time frame +/- 4 hours. **Respond back with your chosen flight in a timely manner.** Flight prices fluctuate frequently and could change before booking. If there is a delay of more than a day, the flights will have to be searched again to make sure they are available and prices increases have not put them out of the lowest cost range. Once the flight is booked, the confirmation will be emailed to you.
3. If a rental car is needed, it will be booked through the Purchasing office based on the information given in the online trip request. Booking is done through the State contract and includes the necessary insurance. **No changes should be made to the reservation at pick up.** Gas refill should be an out of pocket expense and it is reimbursable. Once it is booked, the confirmation will be emailed to you.
4. A week prior to your travel date, a credit card authorization will be faxed, emailed or completed online, depending on the requirements of the hotel, to pay for your room and tax. (If tax is applicable. Hotel stays within Oklahoma are exempt from taxes and you must always verify none have been charged when you check out.)
5. You will receive an email confirming that the CCA has been sent to the hotel. The traveler will be responsible for incidentals holds which could range from $50 to $250 dollars. It is the traveler’s responsibility to be prepared for this prior to travel. University P-cards cannot be used to cover this. If you are flying, you will receive an update on your flight status in this email and a contact number for the travel agency if there is an issue with your flight. You will also receive the contact information from the person who has booked your travel in case there are issues with your hotel.
6. Once you return from your trip, send the hotel receipt to Purchasing to complete the travel packet for your trip that will be used as support documentation in the Works system.

NOTES:

* If travel plans change, notify the Financial Analyst in Purchasing **immediately**. Any additional costs incurred by changes made and not approved prior to trip, may be an out of pocket expense that is not reimbursable.

***Filing a Reimbursement Once Travel is Complete***

1. If you plan to file for reimbursement for mileage, per diem and/or misc. expenses, you will need to complete a Travel Reimbursement form that can be found here: <https://osuit.edu/purchasing/travel.php>
2. Original receipts for parking, shuttle or transportation and baggage fees must be submitted for reimbursement. If receipts are lost, you must complete a Lost Receipt Form found here: <https://osuit.edu/purchasing/travel.php> and submit it with the Reimbursement worksheet. Reimbursement requests should be submitted in a timely manner. Preferably within one week of your return.
3. Complete the form as follows:
   1. Enter your name.
   2. Enter your campus extension.
   3. Enter your CWID.
   4. Enter the name of the account to be charged.
   5. Enter your department name.
   6. Enter the fund number and make sure it is correct.
   7. Enter the starting address (from OSUIT or Residence) to end destination address.
   8. The nature of the official business should match what was entered into the online off campus trip request.
   9. Answer yes that you are a state employee.
   10. Enter the vehicle number only if you are driving a motor pool vehicle. The number will be on the bumper of the car or on the paperwork on the clipboard in the car.
   11. Enter Yes, if you are driving a motor pool vehicle (GOV). Enter No, if you are driving your personal vehicle (POV).
   12. If driving a POV enter your vehicle tag number.
   13. Enter the date when the meeting/conference will start, then the start time of the meeting/conference.
   14. Enter the date the meeting/conference ends, then the time the meeting/conference ends. IE: 5/24/20 @ 8 am: 5/27/20 @ Noon.
   15. Select yes or no depending on if the hotel is a designated hotel for the conference.
   16. Enter your daily commute miles, round trip. This must be on every worksheet.
   17. Enter the month, day and year that your trip starts.
   18. If you are claiming mileage enter the MAP mileage in the first column. For a one day trip, this mileage should be round trip. If it is a multi-day trip, the mileage to your destination is put in the MAP column on the date of the start of the trip. The return mileage will be entered in the ended column on the date of your return.
   19. Enter the time you left. This is the start of your travel time, not the meeting time. **Travel and Meeting times will never be the same!**
   20. If this is a same day trip, enter the travel status hour ended. IE: If you leave home at 6 am and return home at 5 pm. These are the times that should be entered in these particular boxes.
   21. If you are on a multi-day trip, under the date column, list the dates you are in travel status on each line. IE: Your trip is 5/23/20 to 5/28/20, enter 5/23/20 on the first line, 5/24/20 on the second line and so forth until you reach your end date.
   22. For the travel status hours on a multi-day trip, enter the start time on the first day, and skip to the return date and in the ended column place the time you returned home.
   23. Per diem will only be paid on overnight trips. If claiming per diem, place an X in each box that you paid for a meal. If a meal is provided by the meeting/conference, leave that particular meal box empty. Your total per diem will be deducted by the amount of meals that are provided.
   24. If you cannot partake in the meals provided, per OSUIT Travel Policy 3-023: 2.04, you must include a written statement with your reimbursement. (Policy can be found at [www.osuit.edu/purchasing/travel](http://www.osuit.edu/purchasing/travel) ).
   25. Fill in totals for reimbursement that are applicable in the itemized local transportation costs.
   26. Fill in totals for reimbursement that are applicable in the itemized miscellaneous costs.
   27. The form must be signed with an Adobe Electronic Signature (form will have to be converted to a PDF) or manually signed. Typed signatures will no longer be accepted. Then date the request.
   28. Send all forms to the Financial Analyst in Purchasing for processing.
   29. Your reimbursement claim will be entered into AIRS by the Financial Analyst. Per diem will be calculated based on the rate for the city and state located on the GSA website. <https://www.gsa.gov/travel/plan-book/per-diem-rates>
   30. Mileage will be calculated based on the annual rate approved by Stillwater. This varies by year.
   31. Once the request has been submitted in AIRS, the claimant will receive an email from AIRS and the approval process will be the same as the original travel request.
   32. Once the request has been approved by Stillwater Accounting, the claimant will receive an approval email from AIRS. If the claimant is set up on direct deposit, they will receive an email from OMES, a day or so later, with information on the reimbursement direct deposit. If the payment will be processed by a check, the claimant will receive the approved email from AIRS, but not one from OMES. The check will arrive in 3-5 working days after the approved email is received.