

You are responsible for making sure your supervisor is aware of travel and approved the time out of the office.

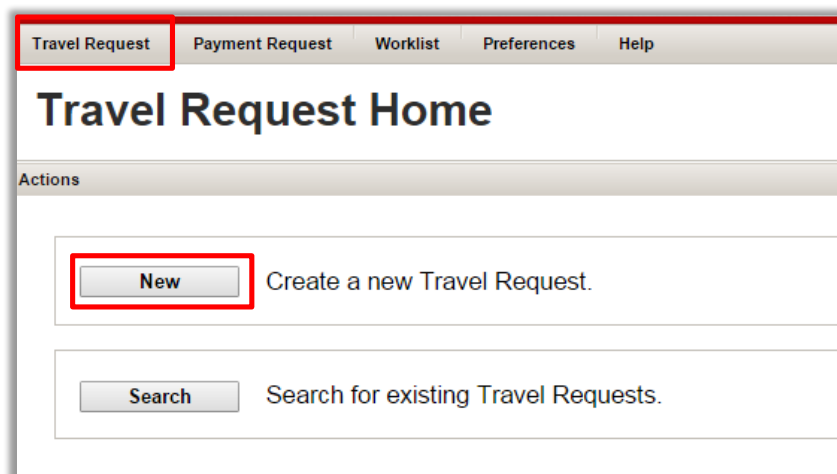
All travel must be in compliance with the University Travel policy. It is your responsibility as the traveler to be aware of the policy. The policy can be found at <https://osutransport.osu.edu/travel-policy/> . All Colleges and Business units have the right to further restrict the policy based on funding.

Before you travel or make any travel related expenses

1. A Travel Request must be approved per policy and a Travel number (T#0000000) issued
2. Make sure to review Travel Policy
3. If you plan to add vacation before or after business trip a cost comparison has to be done for all expenses (ex: single room/versus double room, flights etc.)

How to Create a Travel Request (replaces paper pre –travel worksheet) and obtain a Travel Number

1. Navigate to www.etravel.osu.edu and log in with your OSU login credentials. This will be your *name.#* and associated password.
2. Select “Travel Request” then select “New” to create a new Travel Request.



3. Fill out the Traveler Info Section: **This should be you.**

The screenshot shows the 'Traveler Info' form with the following fields and options:

- Select Affiliation: Choose (dropdown menu)
- Employee ID: (text field) with a link 'Lookup Employee ID' to its right.
- Traveler Name: (text field) with a note: 'Name must have format "Last,First Middle" with no space after the comma'.
- Traveler Email: (text field)
- Traveler Phone: (text field)
- Group Travel: ☐ (checkbox) with a note: 'Group Travel must consist of 10+ individuals traveling to a common place for a common purpose, sharing a unique itinerary.'
- Blanket Travel Request: ☐ (checkbox)

Your information should be populated in the following fields: Affiliation, Employee ID, Job Title, Traveler Name, Traveler Email and Traveler Phone.

The screenshot shows the 'Traveler Info' form with the following fields and options populated:

- Select Affiliation: Staff (dropdown menu)
- Employee ID: 200261944 with a link 'Lookup Employee ID' and 'Job Title: Travel Resource Analyst' to its right.
- Traveler Name: Tobias, Joseph R (text field) with a note: 'Name must have format "Last,First Middle" with no space after the comma'.
- Traveler Email: tobias.59@osu.edu (text field)
- Traveler Phone: 614/292-9290 (text field)
- Group Travel: ☐ (checkbox) with a note: 'Group Travel must consist of 10+ individuals traveling to a common place for a common purpose, sharing a unique itinerary.'
- Blanket Travel Request: ☐ (checkbox)

4. Select the "Group Travel" or "Blanket Travel Request" boxes, if appropriate. **Leave blank if it does not fall within the definitions (most times it will be left blank)**

Group Travel: Applies to trips consisting of 10+ individuals traveling to a common place for a common purpose, sharing a unique itinerary.

Blanket Travel: Used to track and reimburse multiple sequences of in-state transportation expenses. Generally blanket requests cover a specific term, such as the fiscal year or a particular semester.

The screenshot shows the 'Traveler Info' form with the following fields and options:

- Select Affiliation: Non-University (dropdown menu)
- Employee ID: (text field) with a link 'Lookup Employee ID' to its right.
- Traveler Name: Smith, John R (text field) with a note: 'Name must have format "Last,First Middle" with no space after the comma'.
- Traveler Email: john.smith@gmail.com (text field)
- Traveler Phone: 415-749-1234 (text field)
- Group Travel: ☐ (checkbox) with a note: 'Group Travel must consist of 10+ individuals traveling to a common place for a common purpose, sharing a unique itinerary.'
- Blanket Travel Request: ☐ (checkbox)

5. Input the Business Purpose. **(Must be filled in)**

A business purpose should be written in such a way that an individual who is unfamiliar with the department's operation can understand why the trip took place, and how it benefits the mission of the University. Acronyms should be clearly defined for those who are unfamiliar with the organizations being referenced.

Funding Source is not used for Veterinary Medicine

Business Purpose of Trip

Dr. Smith will be traveling to Columbus as an invited guest speaker for the 2015 Excellence in Research Conference which is being hosted by The Ohio State University.

Funding Source:

Type of funding you intend to use (optional)

6. Input the estimated departure/return date and times. This includes any additional days you may be taking as vacation.

- Note if taking vacation this has to be clearly stated in the additional information and cost comparisons have to be done and attached to the travel request.**

For one way trips, leave the Return Date field blank.

Travel Locations

Departure Date (mm/dd/yyyy): 09/21/2015 10:00 AM

Return Date (mm/dd/yyyy): 09/25/2015 3:00 PM

Leave return date blank for one way trips

7. Update the Departure City, State and Country as needed. To save time, this field defaults to Columbus, Ohio.

Departure City:

No:	City:	State:	Country:
1	San Francisco	California	United States

8. Complete the Destination Cities section, using the "+" to add additional destinations as needed.

Destination Cities:				
No:	City:	State:	Country:	Add/Delete:
1	Columbus	Ohio	United States	+ -

9. Complete each Estimated Cost line, we recommend to estimate high to avoid not having enough funds fiscally approved before the trip. As a reminder these **are just estimates**, if the travel request is approved, this does not automatically mean you are reimbursed those cost after the trip is complete.

Estimated Cost Detail				
Category	Type	Description	Amount	Add/Delete
Transportation	Airfare	Prepaid CTP	450.00	+ -
Transportation	Personal Auto (Mileage)	To/From Airport	21.73	+ -
Transportation	Rental Car	National	219.84	+ -
Meals	Per Diem		126	+ -
Lodging	Choose	The Blackwell	610	+ -
Other	Gasoline	Used in Rental Car	50.00	+ -
Other	Parking	SFO Airport	90.00	+ -

Selecting the Airfare Procurement Method:

Upon selecting "Airfare" from the drop down selection, the "Travel Agency" dropdown will appear. This field is used to notate the procurement source for airfare.

Select the appropriate option from the dropdown menu. "Other" is used to notate that Airfare will be procured using personal funds. All pre purchased airfare will be booked through the University travel agency CTP/Concur.

Estimated Cost Detail				
Category	Type	Description	Amount	Add/Delete
Transportation ▼	Airfare ▼	Prepaid CTP		+ -

Select the listed travel agency if prepayment is requested.
 Select 'Other' if using PCard, PO or personal funds to procure expense. Corporate Travel Planners (CTP) ▼ Travel Agency:

[Mileage Calculator](#) [Per Diem Calculator](#)

Using the Mileage calculator:
 Select the “Mileage Calculator” hyperlink.

Estimated Cost Detail				
Category	Type	Description	Amount	Add/Delete
Transportation ▼	Airfare ▼	Prepaid CTP		+ -

Select the listed travel agency if prepayment is requested.
 Select 'Other' if using PCard, PO or personal funds to procure expense. Corporate Travel Planners (CTP) ▼ Travel Agency:

[Mileage Calculator](#) [Per Diem Calculator](#)

Select the estimated departure and return date for this trip, and select “Create Worksheet”.

Mileage Calculator

Departure Date (mm/dd/yyyy): 09/21/2015

Return Date (mm/dd/yyyy): 09/25/2015

[Create Worksheet](#) [Cancel](#)

Date	Rate	Miles	Subtotal
Total Costs:			

[Refresh Total](#) [Done](#) [Clear Worksheet](#)

Input the mileage estimates for each day, and make note of the total costs. Select “Done” to return to the previous screen.

Mileage Calculator

Departure Date (mm/dd/yyyy): 09/21/2015

Return Date (mm/dd/yyyy): 09/25/2015

Create Worksheet Cancel

Mileage for 09/21/2015 to 09/25/2015

Date	Rate	Miles	Subtotal
09/21/2015	\$0.575	18.9	\$10.867
09/22/2015	\$0.575	0	\$0.000
09/23/2015	\$0.575	0	\$0.000
09/24/2015	\$0.575	0	\$0.000
09/25/2015	\$0.575	18.9	\$10.867

Total Costs: \$21.73

Refresh Total Done Clear Worksheet

Input the calculated amount in the Estimated Cost Line

Transportation	Personal Auto (Mileage)	To/From Airport	21.73	+	-
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Using the Per Diem Calculator:

Select the “Per Diem Calculator” hyperlink.

Estimated Cost Detail

Category	Type	Description	Amount	Add/Delete
Transportation	Airfare	Prepaid CTP		+ -

Select the listed travel agency if prepayment is requested.
Select 'Other' if using PCard, PO or personal funds to procure expense.

Mileage Calculator **Per Diem Calculator** Corporate Travel Planners (CTP) Travel Agency:

Select the Country/US State, City, and travel dates for this trip, then Select “Create Worksheet.”

The image shows a 'Per Diem Calculator' window. It contains the following fields: 'Country/US State' with a dropdown menu showing 'USA, OHIO'; 'City' with a dropdown menu showing 'COLUMBUS'; 'Departure Date (mm/dd/yyyy)' with a date picker showing '09/21/2015' and a time dropdown showing '10:00 AM'; and 'Return Date (mm/dd/yyyy)' with a date picker showing '09/25/2015' and a time dropdown showing '3:00 PM'. At the bottom are two buttons: 'Create Worksheet' and 'Cancel'. A red rectangle highlights the entire form area.

The form will then populate with all eligible meals. Use the radio buttons to deselect meals as appropriate. Meals provided by hotel and conferences/meetings must be removed from per diem. Note the total costs and select “Done” when you are finished.

The image shows the 'Per Diem Calculator' window after it has populated with meal data. The top section is the same as the previous image. Below the buttons, it says 'Per Diem for 09/21/2015 to 09/25/2015'. There is a table with the following data:

Country/State	City	Date	Rate	Breakfast	Lunch	Dinner	Subtotal
USA, OHIO	COLUMBUS	09/21/2015	\$56.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$14.00
USA, OHIO	COLUMBUS	09/22/2015	\$56.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$28.00
USA, OHIO	COLUMBUS	09/23/2015	\$56.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$28.00
USA, OHIO	COLUMBUS	09/24/2015	\$56.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$28.00
USA, OHIO	COLUMBUS	09/25/2015	\$56.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$28.00

Below the table, it says 'Total Costs: \$126.00'. At the bottom are two buttons: 'Done' and 'Clear Worksheet'. A red rectangle highlights the 'Total Costs' and the 'Done' button.

Note: Departments may exercise judgement in determining Per Diem reasonableness and eligibility. The time designators may need to be adjusted in certain scenarios to allow additional meal selection.

Note: Should the Per Diem rate populate as \$0.00, it is to indicate that the city selected no longer has a unique Per Diem rate assigned by the GSA. The city “[OTHER]” should be selected from the “City” drop down menu in these instances.

Input the estimated amount into the estimated cost line.

Meals ▼	Per Diem ▼		126	+	-
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10. Notate any expected third party payments. A third party is an organization outside of the University that is paying directly on your behalf, or reimbursing you directly.

Third Party Payment		
Amount: 250	Source: Conference Grant	Record any funding of the trip from a non-OSU source

After the Thrid Pary Payments section is completed, the Estimated Cost Detail will automatically be updated to notate the change.

Estimated Cost Detail	
Transportation:	\$691.57
Meals:	\$126.00
Lodging:	\$610.00
Registration Fees:	\$0.00
Others:	\$140.00
Sub Total:	\$1,567.57
Third Party Payment:	\$250.00
Total Estimated Net Cost:	\$1,317.57

11. If the trip will have a maximum reimburseable amount fill in the “Amount” field under the “Trip Maximum” section. If there is no maximum trip amount, you may leave this field blank.

Trip Maximum	
Amount:	Enter maximum payment amount for the trip. Leave blank if there is no maximum

Note: Completing this field will not prevent payments exceeding this amount from being entered and approved. This field will result in a warning message being displayed if a reimbursement is entered against this trip that exceeds the Trip Maximum Amount. The user may override this message. Payments made outside the eTravel system (i.e. PCard, PO) cannot be tracked automatically, and will need to be considered by the user.

12. Complete the “Travel Chartfield Details.” **This is a required field to submit the travel**

You may use the “+” and “-” buttons to add and delete charfield lines as needed. When splitting the chartfields the total amount must match the Total Estimated Costs for the trip.

BU GL	Org	Fund	Account	Project	Program	User Defined	Max Amt	Percent	Estimated Amt	Add/Delete
UNIV	07440	011000	63406 - Out of State - Non University					100	\$1,567.57	+ -

Important: If a travel request is saved and exited prior to completing the chartfield information, the request may become unavailable when the user logs back in. It is highly recommended that the ORG is completed prior to saving.

13. Add any comments that clarify, or support the travel request. Type your comment into the box, and then select “Add Comment.”

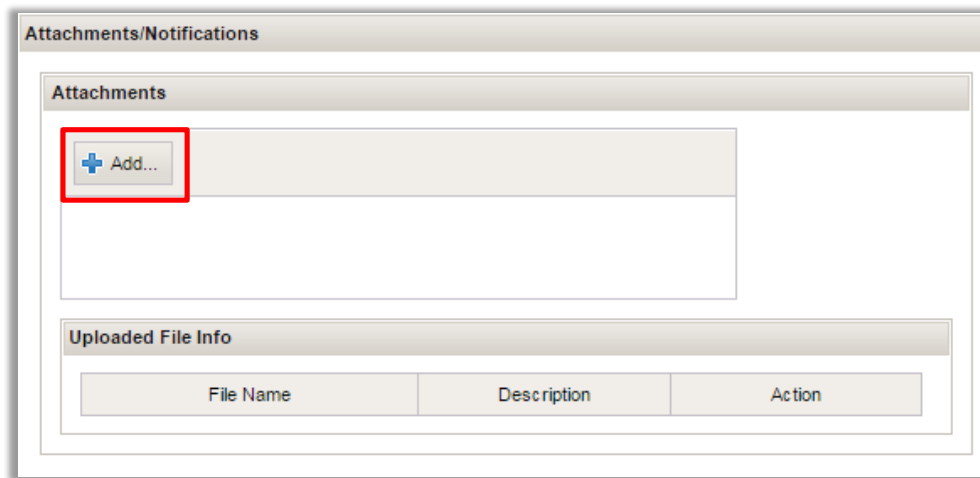
Comment longer than 254 characters will be truncated. If longer comment is needed, please break it up into multiple comments.
You have 180 characters left.

Dinner will be provided by OSU during the duration of Dr. Smith's stay.

Add Comment

This is where you should note if you are taking vacation along with your travel. If you would like assistance with making any travel arrangements, this is where you need to request and clarify what arrangements you need help with. Must attach to travel, completed registration information, login, flight preference, date of birth, hotel and any other special arrangements. Or you can attach a word document with all of the information.

14. Add any attachments that support the travel request. Attachments can be up to 10 MB each and the following formats are supported: PDF, Excel, Word, Image Files (JPEG, GIF, Etc), and RTF (Rich Text Files).



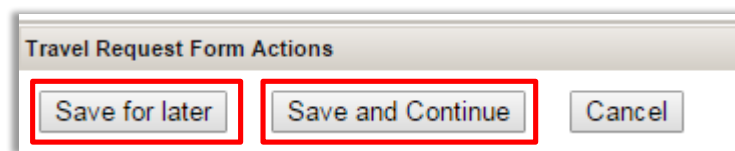
The screenshot shows a window titled "Attachments/Notifications". Inside, there is a section labeled "Attachments" which contains a button with a plus sign and the text "+ Add...". This button is highlighted with a red rectangular box. Below the "Attachments" section is another section labeled "Uploaded File Info". This section contains a table with three columns: "File Name", "Description", and "Action".

Add flights, agendas, maps, hotel information and comparisons.

Important: Documents containing personal or sensitive information (i.e. Social Security Numbers, Bank Account/Credit Account Numbers, etc.) should be redacted before being attached to the eTravel System. All attachments are subject to public records requests and laws.

15. Save your travel request, using the Travel Request Form Actions at the bottom of the page.

If you are ready to submit the request into workflow for approval, select **“Save and Continue.”** If you are not ready for approval, select “Save for Later.”



The screenshot shows a window titled "Travel Request Form Actions". It contains three buttons: "Save for later", "Save and Continue", and "Cancel". The "Save for later" and "Save and Continue" buttons are highlighted with red rectangular boxes.

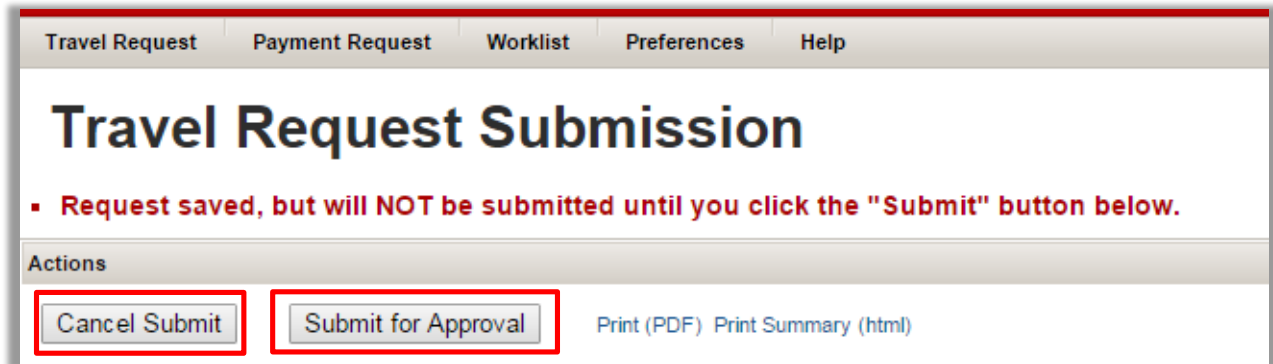
Note: Selecting “Cancel” will change the status of this travel request to “Cancelled.” If this is done inadvertently, email the T# to travel@osu.edu to be reopened.

If the travel has not been approved, and is inadvertently “Cancelled” or “closed” this action cannot be reversed, and a new request will be required.

16. **Submit your Travel Request for Approval**, this is required in order to obtain a travel number.

If you are submitting your request for approval, verify that all information is correct, and then select “Submit for Approval.”

To go back and edit the request, select “Cancel Submit.”



After selecting “Submit for Approval” the Travel Request will route through the workflow process automatically.

NOTE: OSP funded travel will route for both College approval as well as OSP approval.

17. If you are asking the Shared Business Center to help with arrangements, again make sure all documents and information are attached as mentioned in step 13.
18. Once your Travel Request is reviewed for compliance and approved fiscally, you will receive an email directly from the travel system informing you of your approved Travel number.

Travel Arrangements

1. **Once you receive the approved Travel number you may now book all your travel arrangements.**
2. **Airfare and Registration may be prepaid.** All other arrangements will be reimbursed after the trip is complete.

Flights

- A. To book and pre pay airfare, use the University Travel Agent, Corporate Travel Planners (CTP) You may find them at <https://osutransel.osu.edu/> . A flight can only be booked with the approved Travel number TXXX123456. See Concur - Online booking tool for help or call the agent.

1. **You must attach the purchased flight receipt to the original travel request.**

Registration

- B. To pre pay registration you will need to contact the Shared Business Center and provide the approved Travel number. The Shared Business Center will either have a University check sent or use the Service center credit card to pay registration. NOTE: If using OSP funds a credit card is not allowed. Also if you have to log in/password to register then you will need to come to the business center and do the registration if wanting it prepaid by the University.

Hotel

- C. For OSP funded trips only you may use the University travel agency CTP to book and pre pay the hotel.
- D. For trips using UNIV funds, you may use CTP but a purchase order has to be issued through the Shared Business Center. This will require an additional step entering a new eRequest. Please contact the Shared Business Center to make sure this is done correctly.
- E. For simplicity it is recommend to book your own lodging and turn in the folio/itemized receipt
3. OSU has car rental contracts with Enterprise and National. You can find the contract information on the Travel website. <https://travel.osu.edu/> Car rental arrangements need to be made by the traveler.

POST TRIP

Once your trip is complete you have 90 days to receive your reimbursement.

1. Print out a copy of your approved Travel email
2. Fill out the post trip worksheet found at https://osutransport.osu.edu/wp-content/uploads/2014/12/PostTrip_Worksheet.pdf

NOTE: You must fill in what you think you should be reimbursed for. Just because an estimate was approved in pre travel does not automatically mean it is reimbursed after the trip is complete.

3. Gather all original itemized receipts, agendas, maps, etc. and paper clip to the post trip worksheet.
 - a. If you had vacation in addition to the business trip all comparisons of flights, hotels, etc. should have been turned in at time of approval. If any are missing they need to be provided at this time.
4. Turn into the Shared Business Center for compliance review and processing.
5. All reimbursements should be entered and processed within 7 -10 business days of when the business center receives the post trip documents and if all information is correct.

eTravel Quick Reference Guide to Changing Approved Travel Requests

Once a travel request has been approved it may be necessary to edit the request. Some fields on a travel request may be edited after approval, while others may require the request to be reapproved, and others may not be changed at all. The grid below is to serve as a guide to help assist users in determining which fields may not be edited, and which ones require approval.

Core Fields: Fields cannot be edited after approval	Substantive Fields: Edits to these fields will require re-approval	Secondary Fields: Edits may be made, and do not require re-approval.
<ul style="list-style-type: none"> Affiliation Employee ID Traveler Name Trip Business Purpose* Funding Source GL Business Unit Org (Organization) Fund* Account* Project Program* User Defined* Percent <p>*These fields may be edited by the approver prior to approval</p>	<ul style="list-style-type: none"> Departure Date Return Date Departure Time Return Time Departure City Destination Cities Estimated Costs (except the description of existing cost lines) Estimated Cost Category Estimated Cost Type Third Party Payment Amount Third Party Payment Source Trip Maximum Amount 	<ul style="list-style-type: none"> Traveler Email Traveler Phone Group Travel Checkbox Blanket Order Checkbox Travel Agency Estimated Cost Description (Free form field) Attachments Comments <p>Select "Submit Changes" to save</p>
<p>Comments: Edits to these fields alter the fundamentals of the travel request, and cannot be changed after approval. If any edits need made to these fields, the request should be canceled and a new travel request entered.</p>	<p>Comments: Edits to these fields substantially alter the travel request, therefore if they are changed the travel request must be re-approved.</p>	<p>Comments: Edits to these fields do not substantially alter the travel request, so they may be edited without re-approval.</p>

