USU TRAVEL FORUM –

NEW CHANGES TO THE TRAVEL PROCESS

MAY 19, 2021

So far 2020 is like looking both ways before crossing the street

and then getting hit by an airplane

© AP

WELCOME BACK!

IT'S BEEN A WHILE, SO LET'S TAKE A MINUTE TO REVIEW CHANGES TO THE TRAVEL PROCESS, OLD AND NEW.

GREEN HOUSE GAS (GHG) FEE

USU has committed to being carbon neutral by the year 2050. With that in mind and under the direction of President Cockett, a new program has been implemented to help USU offset its carbon footprint related to air travel.

Beginning July 1, 2020 - all employees and non-employee guests who travel by air for University related business were assessed a $10.00 fee that was billed to the department. That fee was collected from the TA (similar to SOS Insurance) when airfare was selected, and the traveler was not a student. For FY21, all GHG fees will be refunded to the department.

Green House Gas Funding

GHG Index [🔍]   GHG Amount $ 20.00

GHG Account [750400   ] ⓘ

OPEN TA'S

ARE BACK – SORT OF

OPEN TA'S SHOULD ONLY BE USED FOR REOCCURRING SAME-DAY MILEAGE ONLY TRAVEL.

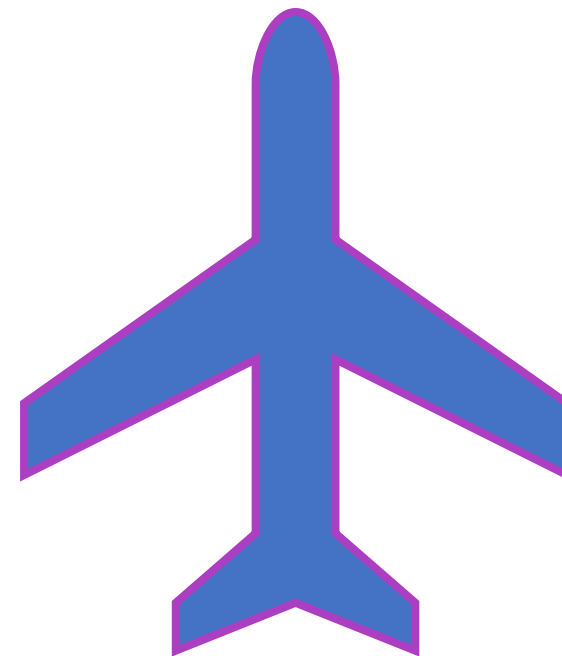They must be closed at the end of each fiscal year

May include expenses related to driving. For example: Parking or tolls

WHEN PROCESSING A TR FOR AN OPEN TA

– PLEASE REMEMBER TO NARROW THE DATES TO JUST THE DATES WE'RE REIMBURSING AND CHANGE THE DESTINATION CITY FROM "VARIOUS CITIES" TO THE ACTUAL DESTINATION CITY WHEN APPLICABLE.

The Travel website has all things travel related. Here you will find help with:

Travel Policies & Procedures

Travel Forms & Training

Cash Advances

How and when to process a payment through EZ- Buy

International Travel Insurance (SOS)

Links to Currency Converter, International Per diem amounts and the International Travel Registry

Links to book rental cars or airfare using our state contracts
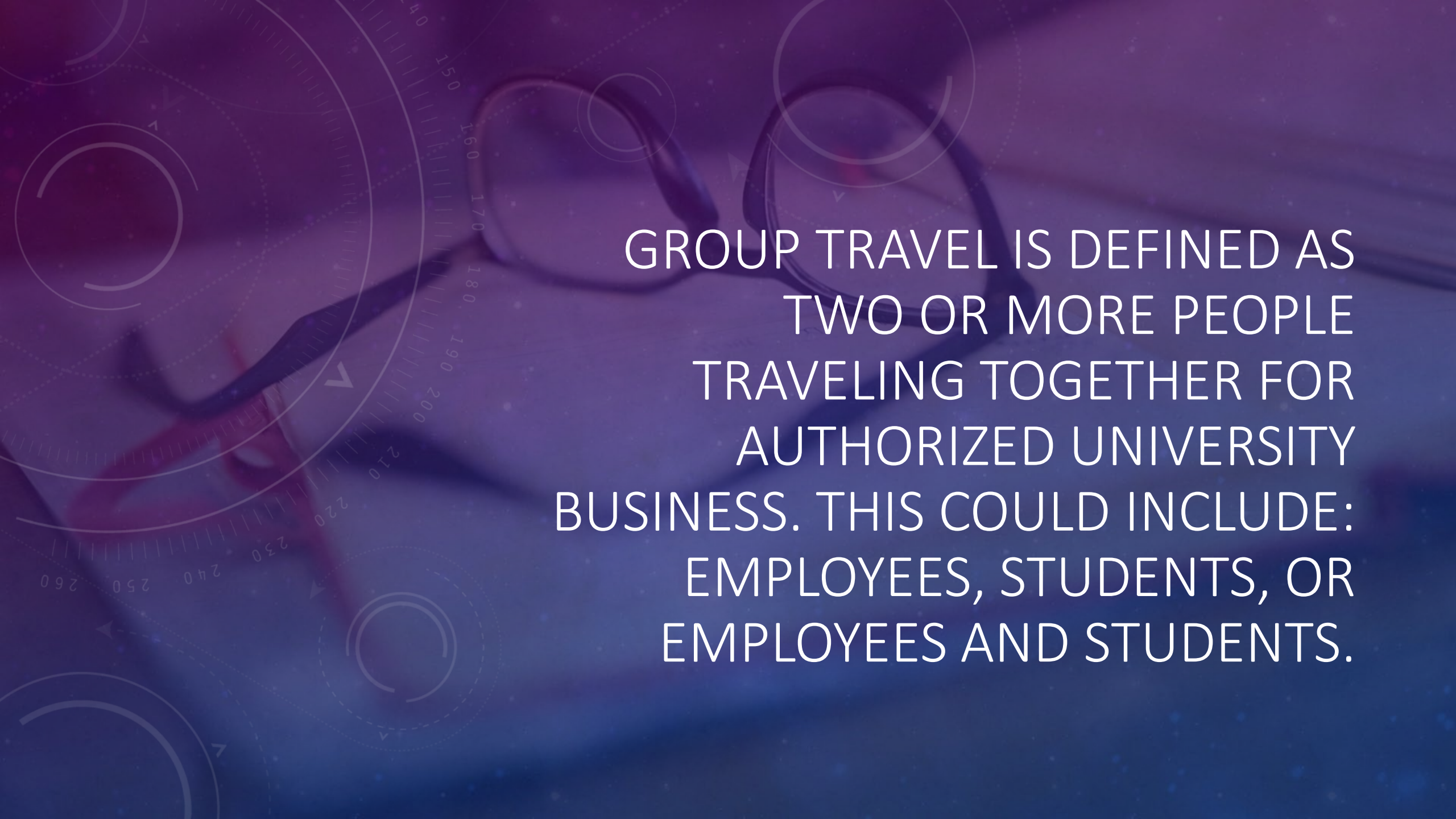
Links to previous Travel Forums

Fly America guidance

Templates for compiling group travel

And MUCH MORE!

GROUP TRAVEL – WHAT'S NEW

GROUP TRAVEL IS DEFINED AS TWO OR MORE PEOPLE TRAVELING TOGETHER FOR AUTHORIZED UNIVERSITY BUSINESS. THIS COULD INCLUDE: EMPLOYEES, STUDENTS, OR EMPLOYEES AND STUDENTS.

Department responsibilities

THE DEPARTMENT AND BUSINESS SERVICES IS RESPONSIBLE TO ACCUMULATE AND REVIEW ALL GROUP TRAVEL EXPENSES TO ENSURE THAT NO DOUBLE PAYMENTS ARE MADE TO INDIVIDUALS, TO MITIGATE THE RISK OF FRAUD, AND TO DOCUMENT THE TOTAL COST OF A GROUP TRIP. A TEMPLATE EXAMPLE IS AVAILABLE ON THE TRAVEL WEBSITE.

CHANGES TO HOW WE PROCESS GROUP TRAVEL

•A TA should be processed in the name of the leader of the group. The TA will be referred to as the "Group TA". A list of all travelers in the group, and any additional TA numbers issued as part of the same trip, should be included in the comment section of the Group TA or attached as a separate document. If any traveler other than the leader is expected to receive a reimbursement, a separate TA must be completed for that traveler. The Group TA# should also be referenced on any separate TA. Any changes to the list of participants should be updated on the Group TR(s).

YOU MUST CHECK THE GROUP TRAVEL BOX FOR EVERYONE TRAVELING IN THE GROUP – EVEN IF EVERYONE HAS THEIR OWN SEPARATE TA – AND ALL TA'S MUST BE CROSS-REFERENCED IN THE COMMENT SECTION OR AN ATTACHMENT.

Group/Individual Travel Expense Template

Group Leader	Employee A
Start Date of trip	__/__/__
End Date of trip	__/__/__
Destination	Any City
Purpose of trip	Seminar
Group TA #	12345

Record of all trip expenses: Type: PC=P-Card; AC=All-Card; TC= travel Card; EZ=EZ-Buy; TR=Travel Reimbursement

TA #	Traveler Name	Airfare	Type	Lodging	Type	Business or Group Meal	Type	Meal Per Diem	Type	Mileage	Type	Parking or Transportation	Type	Registration	Type	Other	Type	TOTAL
12345	Employee A (Group TA)	$ 8,500.00	AC	$ 6,595.00	AC	$ 500.00	AC	$ 50.05	TR			$ 375.00	AC	$ 3,000.00	EZ	$ 1,500.00	AC	$ 20,520.05
12346	Employee B							$ 50.05	TR									$ 50.05
12347	Employee C	$ 550.00	TR	$ 120.00	TR			$ 50.05	TR			$ 40.00	TR					$ 760.05
12348	Employee D							$ 50.05	TR	$ 80.00	TR							$ 130.05
12349	Employee E							$ 50.05	TR	$ 80.00	TR							$ 130.05
12350	Employee F							$ 50.05	TR									$ 50.05
12351	Employee G							$ 50.05	TR									$ 50.05
12352	Employee H							$ 50.05	TR	$ 80.00	TR							$ 130.05
12353	Employee I							$ 50.05	TR									$ 50.05
12354	Employee J							$ 50.05	TR									$ 50.05
12355	Employee K							$ 50.05	TR	$ 80.00	TR							$ 130.05
12356	Employee L							$ 50.05	TR	$ 80.00	TR							$ 130.05
12357	Employee M							$ 50.05	TR									$ 50.05
12358	Employee N							$ 50.05	TR									$ 50.05
12359	Employee O							$ 50.05	TR	$ 80.00	TR							$ 130.05

A GROUP TRAVEL TEMPLATE – CAN BE FOUND ON THE TRAVEL WEBSITE.

APPROVALS – GROUP TRAVEL

- Business Services personnel should ensure that a TA is not approved by the traveler at the 300 level and above. Additionally, if a department head travels with a group, the Group TA should be in the department head's name or the department head should have a separate TA from the group, with the Group TA referenced.

EXAMPLE A: GROUP TRAVEL WITH DEPARTMENT HEAD –
TA'S DONE FOR DEPARTMENT HEAD AND DESIGNATED LEADER OF THE GROUP

GROUP TA IS LISTED IN COMMENT SECTION

COMMENTS

Comments

Group TA123456 - Michelle Bair

GROUP TA – SHOWING TOTAL # IN GROUP COVERED BY THIS TA

DEPARTMENT HEAD'S TA# LISTED IN COMMENTS

EXAMPLE B: TWO EMPLOYEES TRAVELING TOGETHER – SEPARATE TA'S

GROUP TRAVEL IS MARKED AND ADDITIONAL TRAVELER IS NOTED IN COMMENTS WITH TA#

COMMENTS

Comments | Also traveling with Michelle Bair TA123456

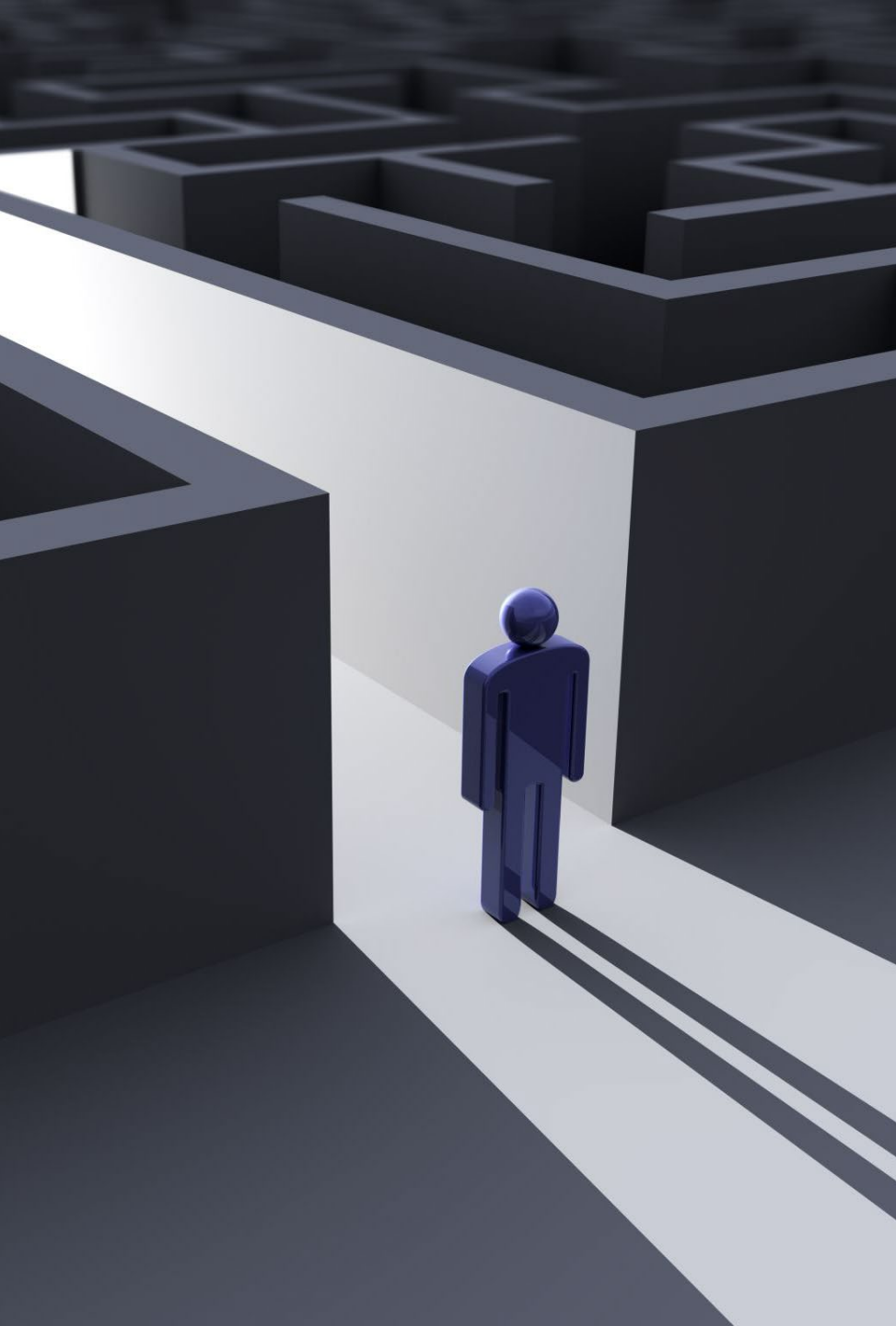# TRAVEL/PROJECT NAME – YOUR NEW BEST FRIEND FOR GROUP TRAVEL REPORTING

YOU CAN SEARCH FOR ALL TA'S THAT SHARE A TRAVEL/PROJECT NAME:

TIPS FOR SEARCHING

- When searching on the Travel Dashboard – the search will match to anything that contains the expression you enter.

- For example: If your Travel/Project name is "this is a test", searching for "test" would return the desired result but searching for "tests" would not.
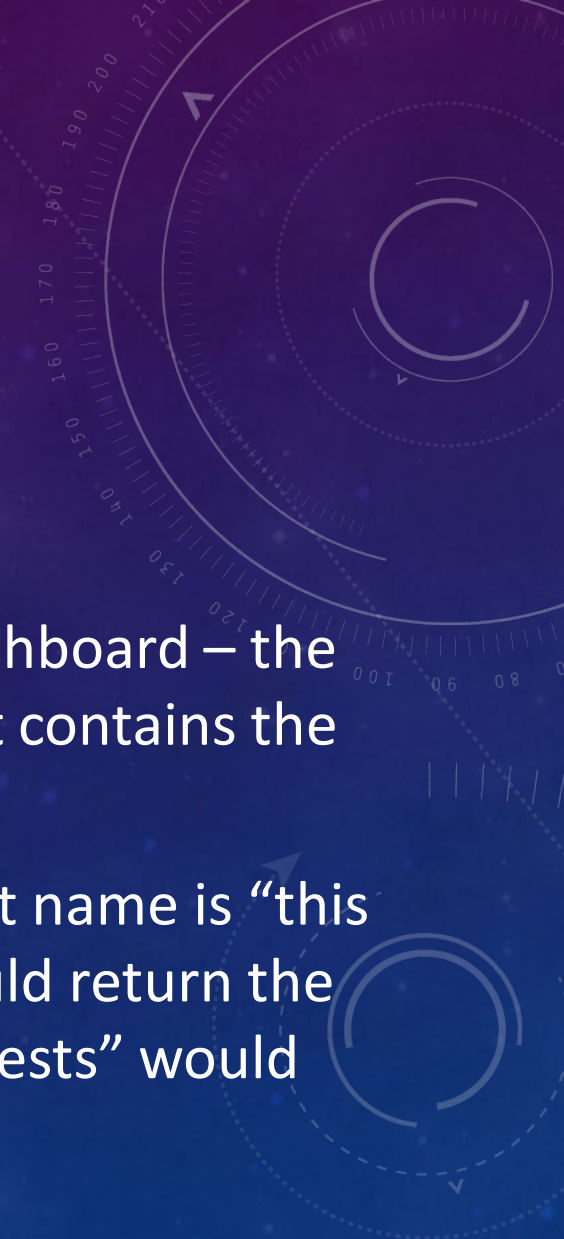
PLEASE REMEMBER TO ARCHIVE OLD TA'S.

- You will be getting a reminder email starting next week for TA's that have not been archived

REMINDER –
FISCAL YEAR 21
ENDS
WEDNESDAY,
JUNE 30, 2021

Please do not approve ANY TRAVEL after 4:55 pm on June 30th. It will create problems with the system and may force a new TA and TR to be created in order to reimburse a traveler.

As we did last year, we will not be doing "rollbacks" of expenses. Expenses are paid in the fiscal year in which they are approved. Meaning any TR's not through final approvals and recorded in Banner by June 30, 2021 will be considered a FY22 expense.