

The background features a blue gradient with several circular gauges and arrows. One large gauge on the left has numerical markings from 140 to 260. Other gauges are smaller and scattered across the scene. Arrows of various sizes and orientations are also present, some pointing clockwise and others counter-clockwise. The overall aesthetic is technical and modern.

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**

WELCOME BACK!

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

The background image shows an industrial facility, possibly a refinery or chemical plant, at night. The scene is dominated by a large, tall distillation column on the left, with a complex network of pipes, scaffolding, and smaller towers extending to the right. In the foreground, there are several large, cylindrical storage tanks. The entire scene is overlaid with a semi-transparent blue and purple gradient. On the left side, there are several circular data visualization elements: a large semi-circular scale with numerical markings from 140 to 260, and several smaller circles with arrows indicating rotation or flow. The overall aesthetic is technical and futuristic.

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

\$

GHG Account

750400



The background features a stack of books at the bottom, with a dark blue gradient above. Overlaid on the gradient are faint, light-colored technical diagrams, including circular gauges with numerical scales (40, 150, 160, 170, 180, 190, 200, 210, 220, 230, 240, 250, 260) and various circular and dashed lines.

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

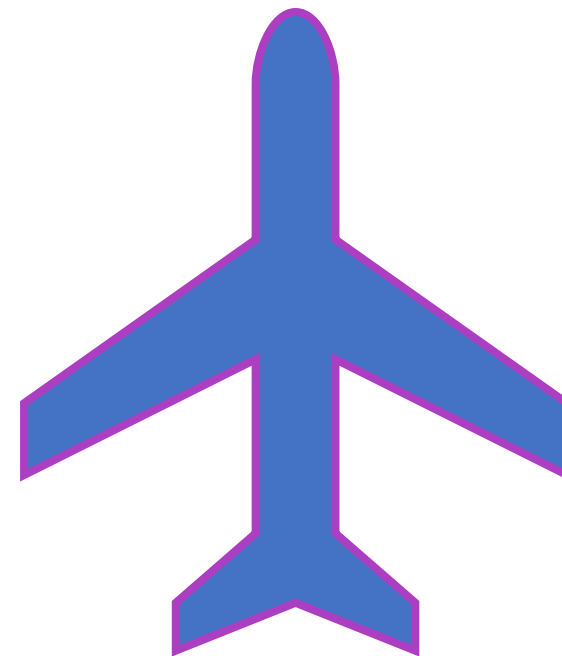


May include expenses related to driving. For example: Parking or tolls

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.

CHECK OUT OUR
UPDATED TRAVEL
WEBSITE @
TRAVEL.USU.EDU



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

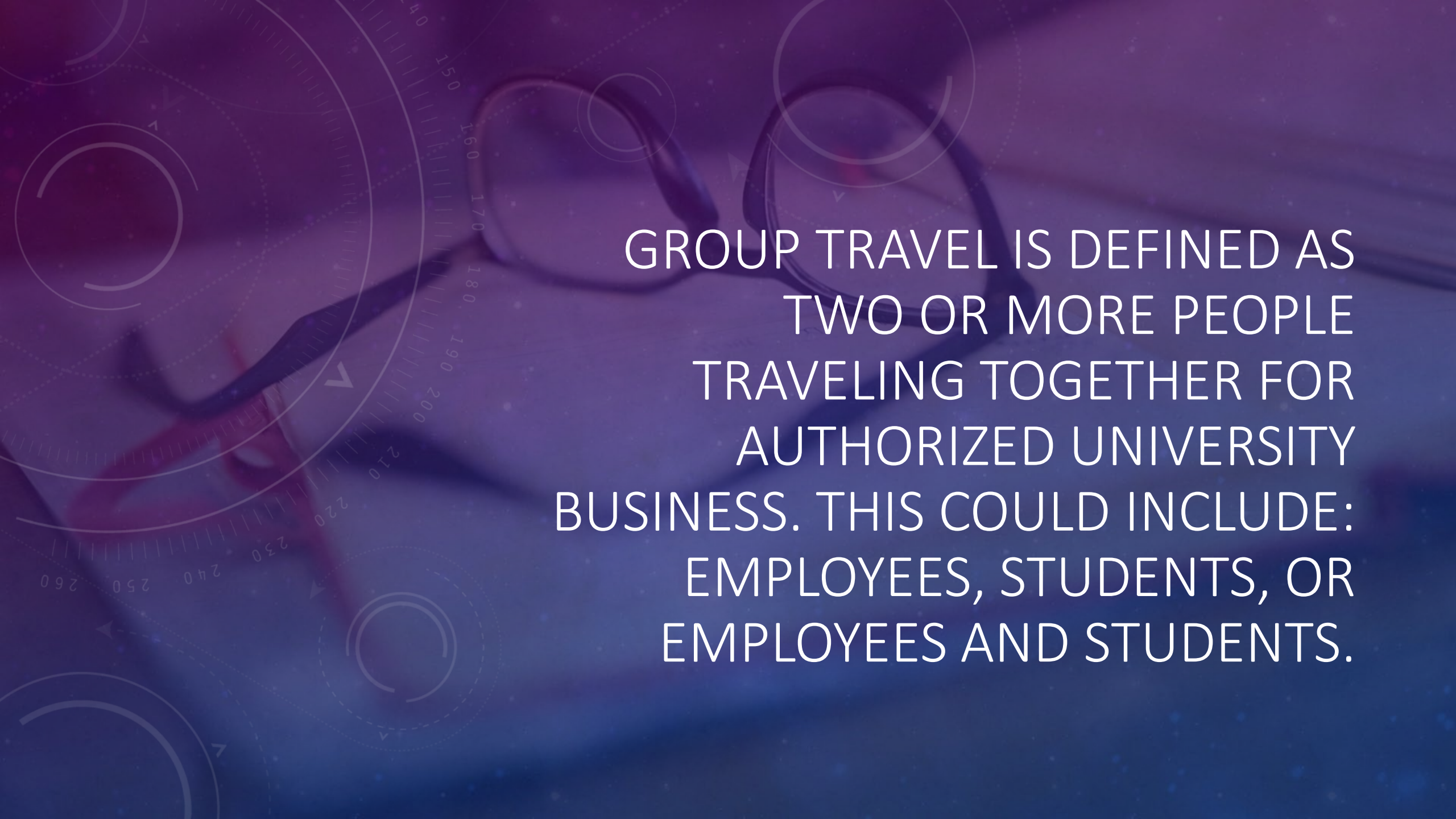
Fly America guidance

Templates for compiling group travel

And MUCH MORE!

GROUP TRAVEL – WHAT'S NEW



A pair of glasses is positioned in the upper center of the frame. The background is a gradient of purple and blue, overlaid with various circular patterns, including solid and dashed lines, and a ruler with numerical markings. The text is centered and written in a clean, white, sans-serif font.

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.

1	Group/Individual Travel Expense Template																		
2																			
3	Group Leader	Employee A																	
4	Start Date of trip	_/_/_																	
5	End Date of trip	_/_/_																	
6	Destination	Any City																	
7	Purpose of trip	Seminar																	
8	Group TA #	12345																	
9																			
10	Record of all trip expenses: Type: PC=P-Card; AC=All-Card; TC= travel Card; EZ=EZ-Buy; TR=Travel Reimbursement																		
11	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
12	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
13	12346	Employee B							\$ 50.05	TR									\$ 50.05
14	12347	Employee C	\$ 550.00	TR	\$ 120.00	TR			\$ 50.05	TR			\$ 40.00	TR					\$ 760.05
15	12348	Employee D							\$ 50.05	TR	\$ 80.00	TR							\$ 130.05
16	12349	Employee E							\$ 50.05	TR	\$ 80.00	TR							\$ 130.05
17	12350	Employee F							\$ 50.05	TR									\$ 50.05
18	12351	Employee G							\$ 50.05	TR									\$ 50.05
19	12352	Employee H							\$ 50.05	TR	\$ 80.00	TR							\$ 130.05
20	12353	Employee I							\$ 50.05	TR									\$ 50.05
21	12354	Employee J							\$ 50.05	TR									\$ 50.05
22	12355	Employee K							\$ 50.05	TR	\$ 80.00	TR							\$ 130.05
23	12356	Employee L							\$ 50.05	TR	\$ 80.00	TR							\$ 130.05
24	12357	Employee M							\$ 50.05	TR									\$ 50.05
25	12358	Employee N							\$ 50.05	TR									\$ 50.05
26	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

TRIP INFORMATION

* Traveling Department	DPCONT - Controllers Office	🔍	ℹ️	Travel / Project Name	Managers Retreat		
Department Approver	Dan Christensen		ℹ️	* Description	Training - Team Building		
* Purpose	Conference	▼	ℹ️	Group Travel	<input checked="" type="checkbox"/>		
* International Destinations	No	▼		* Number of Students	0		
* Student Travelers	No	▼		* Number of Employees	1		
				* Number of Non-Students/Non-Employees	0		
* Departure Date	2021-07-15	📅		* Return Date	2021-07-16	📅	
* Departure City	Logan, Utah	🔍	ℹ️	* Destination City	Salt Lake City, Utah	🔍	ℹ️

GROUP TA IS LISTED IN COMMENT SECTION

COMMENTS

Comments

Group TA123456 - Michelle Bair

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

TRIP INFORMATION

* Traveling Department	DPCONT - Controllers Office	🔍	ℹ️	Travel / Project Name	Managers Retreat		
Department Approver	Dan Christensen		ℹ️	* Description	Training - Team Building		
* Purpose	Conference	▼	ℹ️	Group Travel	<input checked="" type="checkbox"/>		
* International Destinations	No	▼		* Number of Students	0		
* Student Travelers	No	▼		* Number of Employees	16		
* Departure Date	2021-07-15	📅		* Number of Non-Students/Non-Employees	0		
* Departure City	Logan, Utah	🔍	ℹ️	* Return Date	2021-07-16	📅	
				* Destination City	Salt Lake City, Utah	🔍	ℹ️

DEPARTMENT HEAD'S TA# LISTED IN COMMENTS

COMMENTS

Comments

Also traveling with Department Head Dan Christensen TA123457

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

TRIP INFORMATION

* Traveling Department	DPCONT - Controllers Office	🔍	ℹ️	Travel / Project Name			
Department Approver	Dan Christensen		ℹ️	* Description	SCTEM Conference		
* Purpose	Conference	▼	ℹ️	Group Travel	<input checked="" type="checkbox"/>		
* International Destinations	No	▼		* Number of Students	0		
* Student Travelers	No	▼		* Number of Employees	1		
* Departure Date	2021-09-18	📅		* Number of Non-Students/Non-Employees	0		
* Departure City	Logan, Utah	🔍	ℹ️	* Return Date	2021-09-23	📅	
				* Destination City	Atlanta, Georgia	🔍	ℹ️

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

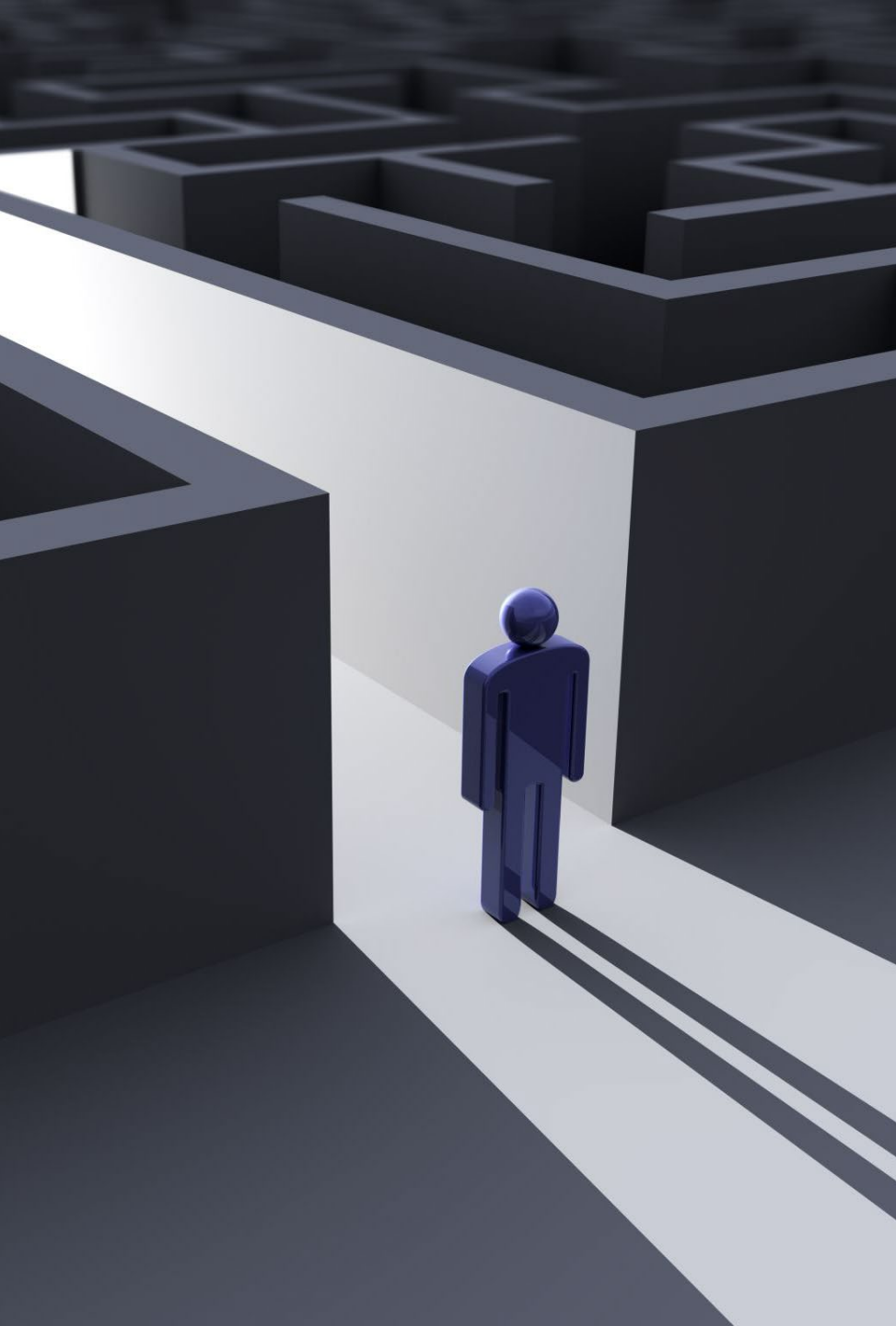
TRIP INFORMATION

* Traveling Department	DPCONT - Controllers Office	🔍	ℹ️	Travel / Project Name	Managers Retreat
Department Approver	Dan Christensen		ℹ️	* Description	Training - Team Building
* Purpose	Conference	▼	ℹ️	Group Travel	<input checked="" type="checkbox"/>
* International Destinations	No	▼		* Number of Students	0
* Student Travelers	No	▼		* Number of Employees	16
* Departure Date	2021-07-15	📅		* Number of Non-Students/Non-Employees	0
* Departure City	Logan, Utah	🔍	ℹ️	* Return Date	2021-07-16
				* Destination City	Salt Lake City, Utah

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

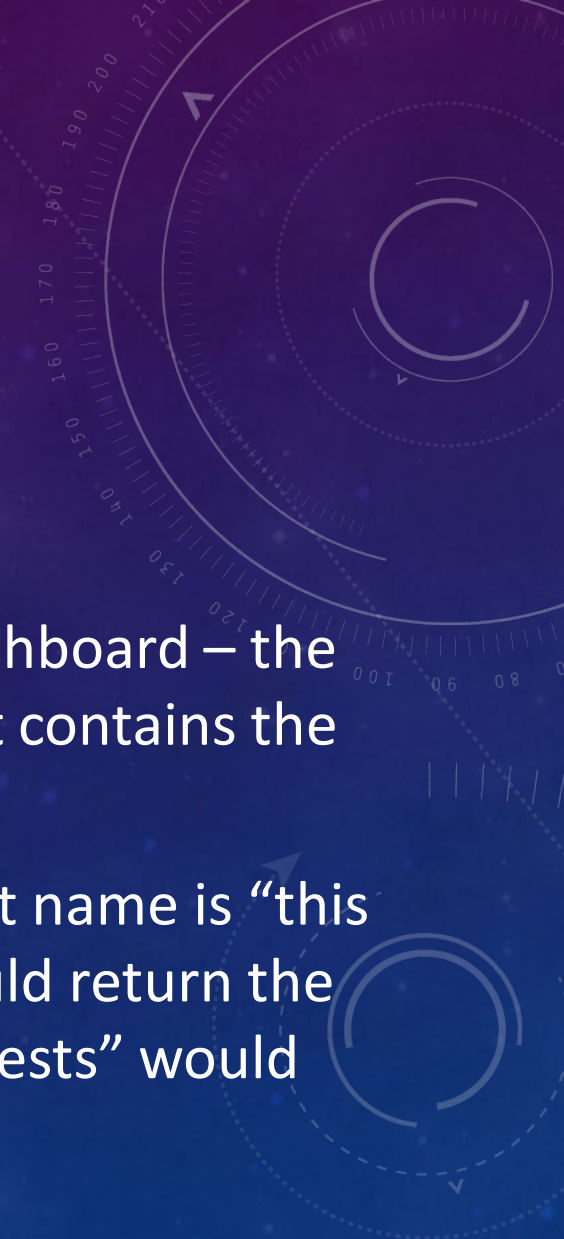
Travel Authorization Search 🔍 Search catalog

Traveler's Name or A-Number	<input type="text"/>	Initiator's Name or A-Number	<input type="text"/>
TA Number	<input type="text"/>	Travel / Project Name (contains)	<input type="text" value="Manager's Retreat"/>
Traveling Department	<input type="text"/>	Initiator's Department	<input type="text"/>
Traveling College	<input type="text"/>	Initiator's College	<input type="text"/>



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.