TRAVEL Tips - miss these at your own risk !

Campus-wide Training @ Service Center

**11/11/15**

**NOTE:** The TRAVEL webpages under Business Services contain the most up-to-date information for travel planning and reimbursement – forms, procedures, rates, suggestions, etc. Know that your Support Staff in the Service Center is willing to help you with travel issues/questions.

# Travel Authorization - All travel shall be conducted in the most efficient and cost-effective manner resulting in the best value for the university.

1. A **Travel Expense Reimbursement** form must be signed by the traveler and the persons immediately responsible for the budget areas involved. Authorizing one's own reimbursement is not acceptable.
2. Faculty must secure written approval (memo or travel expense report form) from the appropriate vice president, department administrator, or director **prior** to incurring any expense.
3. All faculty/staff in Academic and Student Affairs are required to obtain written pre-approval for out-of-state travel before making travel arrangements. (**Out-of-state pre-approval form**).
4. Approvals for non-faculty travel must be obtained in advance from authorized campus personnel, either in written or oral form, subject to departmental policy.

**Foreign Travel -** Foreign travel must be pre-approved prior to making plane reservations. Requests for pre-approval should be submitted as follows.

* Academic Divisions - send pre-approval request to Provost
* All Other Divisions - send pre-approval request to Vice President for Finance & Administration

When you return from your trip, attach the **Preapproval Form** to the Travel Expense Report.

# Use of Department Purchasing Card for Travel -

# FAD .034 SOU Purchasing Card Policy states: “Use of a procurement card is *generally prohibited for travel costs* (39000 account codes), except for conference hotel reservations and payments, rental car reservations, and Athletic Team Travel.” Yes, it is permissible to pay conference registration fees with the Departmental Pcard.

**Key Travel Vendor Contacts:**

* **Jackson Travel Agency** (JTA) – 541-779-5525 contact Sue Rasmussen (sue@jacksontravel.com) or Barbara Shaw (barbara@jacksontravel.com). JTA uses the SOU Travel Card on file to pay for airfare and other travel expenses so long as an **Index Code** is specified to Service Center staff (Mark Gibbons or Carolyn Trip). JTA will need Traveler’s Date of Birth and Full Name as it appears on passport – requirements from the US Department of Homeland Security. **Guests** of SOU may access this payment option with prior authorization of the Division/Budget Authority paying the expenses.
* **Enterprise vehicle rental** – use the online, Enterprise weblink on the Business Services webpages to make vehicle reservations with an **Index Code** and **Account #** provided by Service Center staff (call Mark Gibbons or Carolyn Trip). For unusual vehicle needs, contact Clint Fulcher, Director of Business Rental Sales, @ 503-913-3188 cell or email clinton.d.fulcher@ehi.com.

**Lodging:**

* When the Traveler(s) does not have a personal credit card to use for lodging expenses, most Lodging Vendors offer an alternative method of payment, referred to as a **3rd Party Authorization** process. It uses the **SOU Institutional Travel Card**. Contact your Support Specialist in the Service Center staff for assistance.
* The Service Center maintains a list of Ashland lodging Vendors willing to give discounted rates of stay and Direct Bill SOU for Job Candidates / Guests / Visiting artists to avoid spending their personal funds when visiting SOU.

**One Day Trips** – breakfast and dinner allowances are considered taxable income by IRS regulations; hence, *recording departure and return time of day* on the **Travel Expense Reimbursement Form** is crucial in calculating and coding meal reimbursements.

**Corporate Travel Card and Travel Advances -** SOU staff who travel frequently can apply for a **Corporate Travel Card** (US Bank VISA) with their Supervisor’s authorization. This card is made available to SOU employees for use in funding, official university travel expenditures.

1. The Travel Card is available to all employees who anticipate traveling on university business. This is a personal liability bank card.
2. Travel advances by check are NOT issued to SOU staff.
3. Use the Travel Card for securing ATM travel advances.
4. The Travel Card is sent directly to the cardholder. *It is the responsibility of cardholders to personally pay their own bill.* After the trip has been completed and a travel expense report form has been submitted, the university sends a reimbursement check to the traveler.