

Fall 2017 Faculty & Staff Presentation – Travel/ASA/Business Expenses

Travel

Process: Pre-Travel

1. Book the hotel as soon as reservations are available
2. Submit a Travel Authorization Form (TAF) no later than 4 weeks before the travel begins. Obtain quotes if necessary to fill out the form, i.e. from Expedia or Kayak
 - a. **SOJC Travel Support:** Currently, most SOJC faculty and staff receive \$2,500 in travel funding support per fiscal year (7/1 – 6/30). If you would like to use this funding source for your trip, please use index FJTRGF along with your Y- activity code on the TAF.
3. Wait to receive email confirmation from the SOJC Business Office that the travel request has been approved before contacting a travel agent or arranging flights. Upon receiving approval, contact a UO travel agent or book flights personally. Unless absolutely necessary, please do not book flights more than 2 months in advance
 - a. If a flight is booked personally and personal time is added or an indirect route is used, a comparison quote is always required. (**Note:** Flying out of PDX rather than EUG no longer requires a comparison quote as long as no other variables change). The comparison quote must:
 - i. Be made on the same day as when the flight is purchased
 - ii. Be generated from a multi-listing source (such as Expedia or Kayak) – obtaining a quote from a single airline’s website is insufficient
 - iii. Include the range of prices available
 - iv. Be included in the reimbursement documentation
 - b. If traveling out of state, even to a destination such as Seattle, a comparison airfare quote is needed if a traveler chooses to drive rather than fly. The quote should be obtained as soon as possible after the travel authorization form has been approved, and it should follow the same guidelines as specified above
4. Contact a Pcard holder (Gail or Andrea) to process conference registration expenses
5. If traveling within the state of Oregon to a UO/SOJC-organized meeting or event, a TAF is not needed. All other in-state travel requires a TAF before a trip begins
6. If traveling to a foreign country, the trip should be registered with Risk Management:
<http://safety.uoregon.edu/travel-registration>

Travel: General Guidelines

- **Timing of Receipts:** Travelers are required to turn in receipts within 60 days of returning based on IRS policies
- **Summary Sheet:** Please use the Central Business Services Office Travel Reimbursement Form as a summary sheet to fill out the expenses for which you are expecting reimbursement. To save time, do not feel obligated to include per diem in this total since this can be calculated automatically when processing the reimbursement form. However, please note on the summary to include per diem if this is desired. Additionally, please note any meals that were provided or available free of charge.
- **Conference Travel:** If attending a conference, please turn in a conference program and mark:
 - Which sessions you attended
 - Where in the program your name appears (if you participated)
- **Non-Conference Travel:** Any trip that does not involve participating in a conference requires a daily log of activities. The log must include:
 - Names of places visited or events attended each day
 - Names and titles of individuals visited/consulted each day
 - Description of all business-related activities
 - If applicable, the name of any particular research project related to the travel

- **Outside Entity Pays for Travel:** If a separate entity pays for any personal travel expenses, documentation of this must be provided (including exactly which expenses were covered) when submitting all other receipts for reimbursement
- **Lodging:**
 - If a traveler lodges with a colleague/friend, up to \$25.00 per day may be reimbursed.
 - Lodging above per diem: If the daily rate is above per diem but the hotel is a conference hotel with a special rate, the special rate must be documented in the reimbursement materials (i.e. a printout of the website showing the rate). If the conference hotel is sold out, the unavailable conference rate is then used as the maximum amount that can be reimbursed per day at a different hotel.
 - If the travel is not related to a conference and the traveler is unable to find a hotel for less than the per diem maximum, this must be documented by including a printout of the search from a multi-listing source such as hotels.com. In this case, the search should not include 4- and 5- star hotels.
- **Currency Conversion:** Please do not attempt to calculate currency conversion for any expenses paid in a foreign currency. This will automatically be calculated for you based on a single source used by UO's Travel Office.