All Ohio State Universities students, staff, faculty, and guests need a **Spend Authorization (SA)** to travel using University funds. **SA** should be assigned prior to the travel start date for any authorized business/research travel. Ohio State will pay for reasonable and necessary expenses incurred. **All SA** are reviewed and approved by the Earth Sciences Administrator Manager and then by the School Director. Attritional review is done by the College Service Center.

Prepayment and/or reimbursement of travel expenses are allowed only when payment for the expenses has not been /will not be received by the traveler from a third party.

All business/research-related travel expenses paid with university funds must comply with university **Expenditures, Purchasing Card**, and **Purchasing** policies. Please take the time to review the university policy before your travels.

For information on the latest OSU (Ohio State University) travel please visit the **OSU Travel website**

**When to submit a Spend Authorization (Travel Request):**

- Submit your Travel request information as soon as you know about your travel
- Any time you are leaving the OSU campus for university business/research
- When your research Abstract has been accepted and you are presenting at/attending a conference
- When your advisor is supporting your research/conference travel
- When you are awarded a Travel grant or funding like the FOH (Friends of Orton Hall) (Friends of Orton Hall) award.

**How to set up a Travel Request (Spend Authorization):**

- Submit a “Spend Authorization” using the **WORKDAY SYSTEM**. Detailed information on how to create and submit a SA can be found at the Administrative Resource Center website **SA-Create a Spend Authorization** section. Below are some quick tips you should follow:
  - Attach quotes for travel expenses like flight cost, hotel cost and rental car costs
  - Include Business purpose using the 5 W (Who, What, When Where, and Why)
  - Attached funding approval from PI/Advisor or Award document you received
  - Get Funding source/WORK TAG from PI/Advisor or Award administrator
  - Include the “International- Acknowledgement of understanding form” when you are traveling overseas.
  - For estimated cost for hotel and per diem use the **U.S. General Services Administration website**

**Corporate Travel Planners (CTP):** Is the university’s designated individual business travel agency. Concur is the travel management tool CTP provides so that travelers can research fares, adjust selection parameters, and finalize booking with an approved SA number.
PLEASE USE the OSU Travel webpage “Book Travel Online” to document quotes for **flights**, **hotels** and **rental cars** in a PDF format. Below is a guide on how to get a quote from CTP

- Click on “Book Travel Online”

- Select “Round trip/One Way/ Multi City” depending on your travel schedule. Enter “Departed/Return” date, Airport “From/to”, “Economy class”, and press “search”
- Click on “Select” for the flight you would like to purchase. **Do not** select flights that show “**Not Allowed**” or the yellow triangle with an exclamation sign. OSU does not recommend this selection.

- Make a PDF of the next page that includes flight details and costs
**Pre-payment:**

Once your Spend Authorization is submitted through Workday it will be reviewed and approved by Administrative Manager and School Director. You will get an email from the Administrative Manager with steps you will need to take for prepayment and reimbursements.

You will get an email notification from WORKDAY. Once you get this email notification you can use the approved SA number to make payment for the approved travel expenses.

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**From:** OSU Workday Administrator <osu@myworkday.com>

**Sent:** Wednesday, July 28, 2021 6:55 AM

**To:**

**Subject:** Spend Authorization - Successfully Completed

Spend Authorization SA- has been approved.

Business Process: Spend Authorization: SA-

Enter Traveler Information

Primary Traveler: 

Phone: 

Email: 

Spend Authorization:

D.H. has been approved on 12/13/2021 for 123.45 USD.

Click Here to view the notification details.

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- Flight purchases need to be made through Corporate Travel Planners (CTP). You can purchase your airfare by calling [CTP customer service phone line](#) or by logging on to Concur (Book Travel Online).
- If you go through Concur (Book Travel Online), you will need to select “AIRFARE PREPAYMENT” as your payment method, Confirm your flight details and for your travel and enter the approved SA to finalize your purchase.
SCHOOL OF EARTH SCIENCES TRAVEL INSTRUCTIONS

SELECT A METHOD OF PAYMENT

To comply with the Ohio State University Travel Policy, an approved Spend Authorization (SA) is required to finance purchases.

AIRCARE:
- Select the AIRFARE PREPAYMENT card to reduce personal out of pocket expenses (An APPROVED Spend Authorization (SA) is required).
- For business travel only.
- For all OSU business funding sources (UNIV, Health System AND OSEP/Sponsored).
- Do not use a Department or Individual PCard for airfare purchases

HOTEL:
- There are no OSU credit cards issued for hotel reservations.
- To book a hotel reservation, OSU business travelers must add a personal credit card or PCard (see Add credit card link below).

This is a Non-Refundable Ticket

Customers holding NON-REFUNDABLE type tickets may UNUSUALLY cancel their journey, and return these tickets to any destination in the customer's system, within one year following the DATE OF ISSUE (READ THE RATE RULES to be certain this applies). Reservations MUST be cancelled by the intended (original) departure day, or tickets will be valid and have NO value for future use. These rules apply to SOMEONE booking only.

By completing the booking, you agree to the fare rules and restrictions and hazardous goods policy.

Add to your Itinerary

Flight Long Beach, CA (LGB) to Denver, CO (DEN)

Southwest 1690

Departure: 02:15 PM
Long Beach Airport (LGB)

Arrival: 05:10 PM
Denver International Airport (DEN)

Seat: No seat

Flight Denver, CO (DEN) to Columbus, OH (CMH)

Southwest 1364

Departure: 07:10 PM
Denver International Airport (DEN)

Arrival: 09:05 AM
Columbus International Airport (CMH)

Seat: No seat

TOTAL ESTIMATED COST

Air $391.54 USD
Total Estimated Cost $435.96 USD

If you cancel at this point your reservation may be cancelled. Note: Any part of the trip that is instant purchase or has deposit applied will not be cancelled.

Add to your Itinerary

August 19, 2022
Vacation or personal vacation time combined with business/research travel?

- List any personal time you are taking on Spend Authorization.
- You will need to fill out a Travel Comparison Worksheet for your flight if your flight dates include your personal vacation time.

Driving instead of flying?

- Travel Comparison Worksheet is needed along with support documentation to justify driving is more economical than flying.
- Comparison needs to be documented using flight costs from CTP.

Rental Vehicles:

- Travelers are required to procure rental car services from the university-contracted rental car agencies. Under limited circumstances when procurement of rental car services from a non-contracted agency is justifiably necessary.
- Enterprise Rent-A-Car, National Car Rental and Hertz are the university-contracted rental car agencies. For more information, please visit OSU Travel website- Rental Car Discounts website.

When to submit reimbursement claim

- Once you have a final itemized receipt for a travel cost or return from travel.

Expense Report – reimbursement claim

- Expense reports are submitted so that you are reimbursed for business-related costs, such as airfare, mileage, meals, or hotel expenses.
Travel and Expenditure Policies
OSU Travel https://osutravel.osu.edu/
CONCUR Corporate Travel Planners (CTP) https://busfin.osu.edu/buy-schedule-travel/travel
Travel Policy https://busfin.osu.edu/sites/default/files/211_travel.pdf
Rental car discounts https://busfin.osu.edu/document/enterprise-rent-car-national-car-rental

Consult with the School Administrative Manager before submitting a Travel requests or if you have any questions regarding OSU Travel:

SES (School of Earth Sciences) (School of Earth Sciences) Administrative Manager
Soyoung Carpenter
carpenter.634@osu.edu
(614) 688-2884

SES (School of Earth Sciences) Fiscal Associate
Ben Hildebrandt
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