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 Administer 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 <u>Expenditures</u>, <u>Purchasing Card</u>, and <u>Purchasing</u> 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 <u>OSU Travel website</u> <u>When to submit a Spend Authorization (Travel Request)</u>:

- 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 <u>WORKDAY SYSTEM</u>. Detailed information on how to create and submit a SA can be found at the Administrative Resource Center website S<u>A-Create a</u> <u>Spend Authorization</u> 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>U.S. General Services Administration</u> website

<u>Corporate Travel Planners (CTP)</u>: 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 "<u>Book Travel Online</u>" 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

- Fiscal Year 2022 Travel Guidelines Issued June 7, 2021.

 Image: Contact a Travel Agent
- 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"

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You will be required to provide SA# at time of purchase.	an approved Effective July 1, continued focus	2021, the university will allow business-related tra on fiscal responsibility. Review the FY22 Travel G	vel in line with updated health and safety requirements a Buidelines for the Travel Approval Process and more spec	nd our cific details.
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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.

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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.



- Flight purchases need to be made through Corporate Travel Planners (CTP). You can purchase your airfare by calling <u>CTP customer service phone line</u> 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.

SELECT A METHOD OF PAYMENT

To comply with the Ohio State University Travel Policy, an approved Spend Authorization/SA# is required to finalize purchase.

AIRFARE:

- 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 OSP/Sponsored).
- Do not use a Department or Individual PCard for airfare purchases

HOTEL:

- There are no OSU credit cards loaded 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).

How would you like to pay?



A This is a Non-Refundable Ticket

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

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





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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 <u>Travel Comparison Worksheet</u> for your flight if your flight dates include your personal vacation time.

Driving instead of flying?

- <u>Travel Comparison Worksheet</u> 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 Herts are the university-contracted rental car agencies. For more information, please visit <u>OSU Travel website- Rental Car Discounts</u> 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 <u>https://osutravel.osu.edu/</u> OSU Expenditures Policy <u>https://busfin.osu.edu/document/expenditures-policy-411-pdf</u> CONCUR Corporate Travel Planners (CTP) <u>https://busfin.osu.edu/buy-schedule-travel/travel</u> Travel Policy <u>https://busfin.osu.edu/sites/default/files/211_travel.pdf</u> Rental car discounts <u>https://busfin.osu.edu/document/enterprise-rent-car-national-car-rental</u>

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 <u>hildebrandt.31@osu.edu</u> (614)-688-0530