



## SCHOOL OF EARTH SCIENCES TRAVEL INSTRUCTIONS

All Ohio State Universities students, staff, faculty, and guests need a **Spend Authorization (SA)** to travel using University funds. **SA** should be approved in Workday 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 School Manager and then by the school Director. Additional 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 make yourself familiar with these policies.

For information on the latest OSU (Ohio State University) travel please visit the [OSU Travel website](#). Below are some guidelines on how to prepare for your travel:

### **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) 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.
  - For estimated cost for hotel and per diem use the [U.S. General Services Administration website](#)

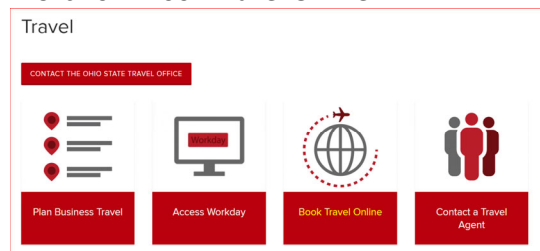
**Corporate Travel Planners (CTP):** Is the university's designated individual business travel agency. Concur is the travel management tool CTP provides so that travelers can research fares, adjust selection parameters, and finalize booking with an **approved SA number**.



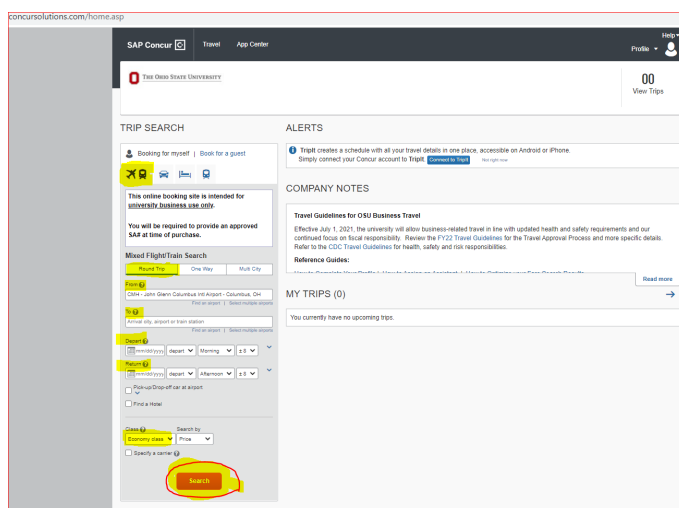
## SCHOOL OF EARTH SCIENCES TRAVEL INSTRUCTIONS

PLEASE USE the OSU Travel webpage “[Book Travel Online](#)” or “Contact a Travel Agent” to document quotes for **flights, hotels and rental cars** in a PDF format. Below is a guide on how to get a flight quote using the online booking tool.

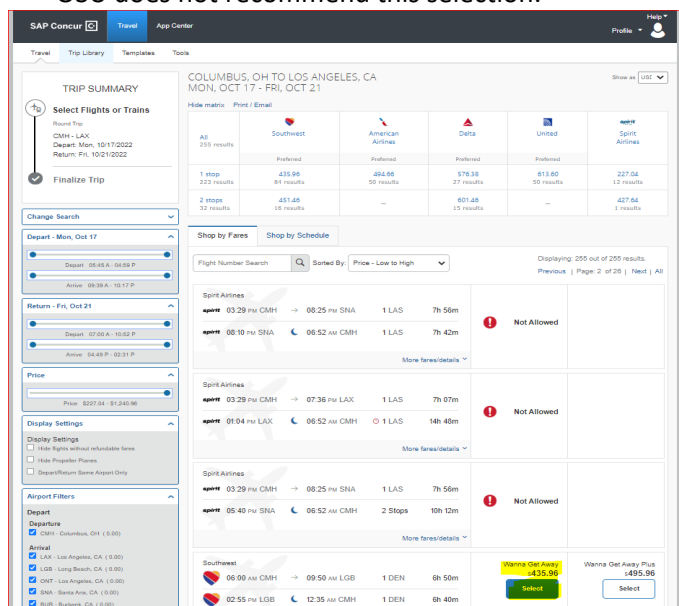
- Click on “Book Travel Online”



- 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.





## SCHOOL OF EARTH SCIENCES TRAVEL INSTRUCTIONS

- Make a PDF of the next page that includes flight details and costs.

Description	Fare	Taxes and Fees	Charges
Airfare	\$361.04	\$24.32	\$435.36
Total Estimated Cost:		\$435.36	
Total Due Now:		\$435.36	

### Pre-payment:

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

You will get an email notification from WORKDAY [osu@myworkday.com](mailto:osu@myworkday.com). Once you get this email notification you can use the approved SA number to make payment for the approved travel expenses.

**From:** Ohio State Workday Notification [osu@myworkday.com](mailto:osu@myworkday.com)  
**Sent:** Tuesday, July 11, 2023 6:16 AM  
**To:** [Redacted]  
**Subject:** Spend Authorization - Successfully Completed

Spend Authorization SA-00[Redacted] you submitted on behalf of [not available] has been approved. Before departure and/or incurring travel costs, please make sure to review the Travel Policy at <http://travel.osu.edu>.  
 Business Process: Spend Authorization: SA-00[Redacted], [Redacted] on [Redacted] for [Redacted] USD  
**Subject:** Spend Authorization: SA-[Redacted]  
[Click here to view the notification details.](#)

- 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.



Add to your Itinerary

Friday, October 21, 2022

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

Change | Cancel All Air

Southwest 1690

Departure: 02:55 PM  
Long Beach Airport (LGB)  
Duration: 2 hours, 15 minutes  
Nonstop

Confirmation: 4JIHNR  
Status: Booked directly in Southwest  
4JIHNR

Seat: No seat

Arrival: 06:10 PM  
Denver Intl Airport (DEN)

Additional Details  
E Ticket  
Cabin: Wanna Get Away (T)

1 hr, 45 min layover at Denver Intl Airport (DEN)

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

Southwest 1364

i This flight leaves on Oct 21 and arrives on Oct 22.

Departure: 07:55 PM  
Denver Intl Airport (DEN)  
Duration: 2 hours, 40 minutes  
Nonstop

Confirmation: 4JIHNR  
Status: Booked directly in Southwest  
4JIHNR

Seat: No seat

Arrival: 12:35 AM  
John Glenn Columbus Intl Airport (CMH)

Additional Details  
E Ticket  
Cabin: Wanna Get Away (T)

Add to your Itinerary

TOTAL ESTIMATED COST

Air

Airfare quoted amount:

\$361.64 USD

Taxes and fees:

\$74.32 USD

Total Estimated Cost:

\$435.96 USD

Form of Payment

Credit Card, Last four digits: 1329

TICKET NOT YET ISSUED. AIRFARE QUOTED IN ITINERARY IS NOT GUARANTEED UNTIL TICKETS ARE ISSUED.

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

Next >>

Cancel Trip

August 18, 2023



## SCHOOL OF EARTH SCIENCES TRAVEL INSTRUCTIONS

### **Vacation or personal vacation time combined with business/research travel?**

- List any personal time you are taking on the 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 to show the price difference between driving and flying.

### **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 [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.
- Please note per OSU Travel policy:  
The traveler must submit an **expense report** with itemized receipts and other applicable supporting documentation **within 60 days of the expense being paid or incurred**.  
If an expense report with supporting documentation is not submitted by the 60-day deadline, then the expense(s) may be treated as taxable income to the traveler.

### **Travel and Expenditure Policies**

OSU Travel <https://osutransport.osu.edu/>

OSU Expenditures Policy <https://busfin.osu.edu/document/expenditures-policy-411-pdf>

CONCUR Corporate Travel Planners (CTP) <https://busfin.osu.edu/buy-schedule-travel/travel>

Travel Policy <https://busfin.osu.edu/policies-forms?combine=&department%5B%5D=258>

Rental car discounts <https://busfin.osu.edu/document/enterprise-rent-car-national-car-rental>

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

#### **SES (School of Earth Sciences) Administrative Manager**

Soyoung Carpenter

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#### **SES (School of Earth Sciences) Fiscal Associate**

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