THE OHIO STATE UNIVERSITY

All Ohio State Universities students, staff, faculty, and guests need a **Spend Authorization (SA)** to travel when 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** or **Grant Award Service Center** depending on the funding source.

Prepayment and/or reimbursement for 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**.

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"
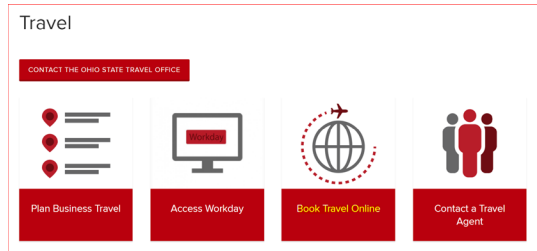
- Select "Round trip/One Way/ Multi City" depending on your travel schedule. Enter "Departed/Return" date, Airport "From/to", "Economy class", and press "search."
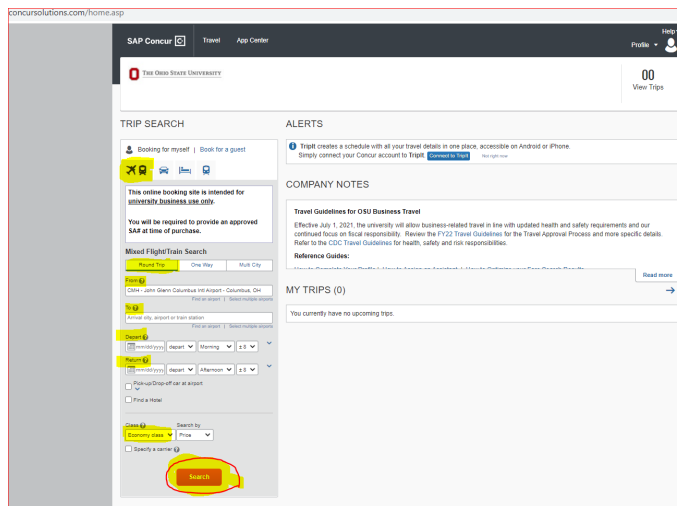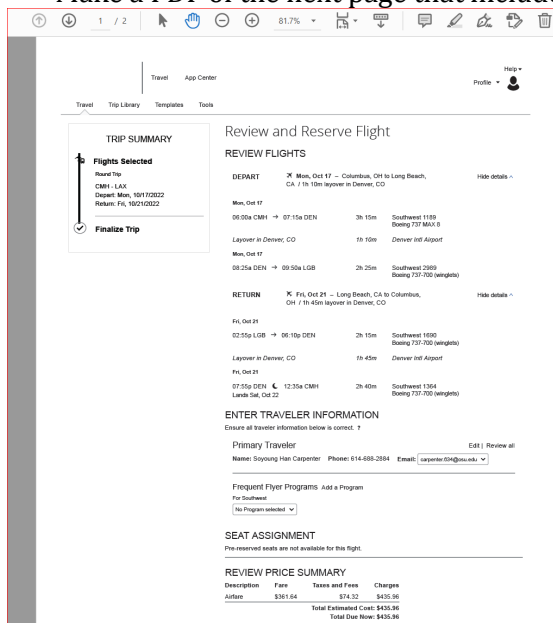

- Click on "Select" for the flight you would like to purchase. **Do not** select flights that show "**Not Allowed**" [Not Allowed] or the **yellow triangle with an exclamation sign** ⚠. OSU does not recommend this selection.
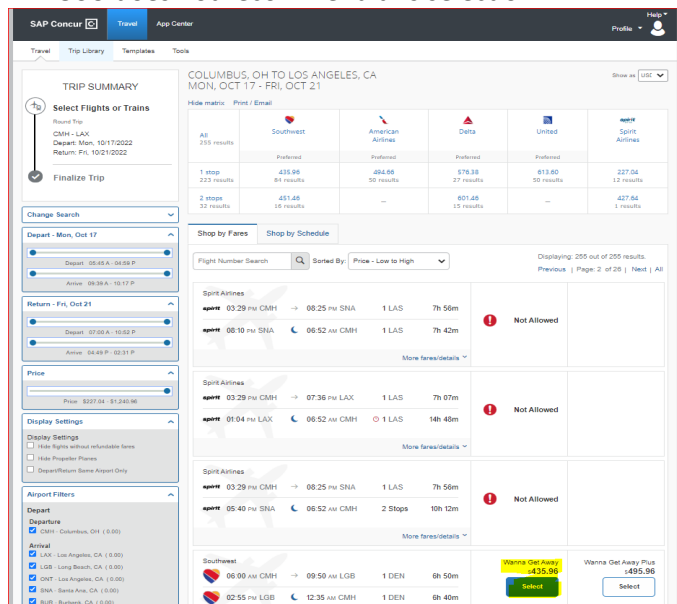
- Make a PDF of the next page that includes flight details and costs.

Pre-payment:

Once your Spend Authorization is submitted through Workday it will be reviewed and approved by 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 . Once you get this email notification you can use the approved SA number to make payment for the approved travel expenses.
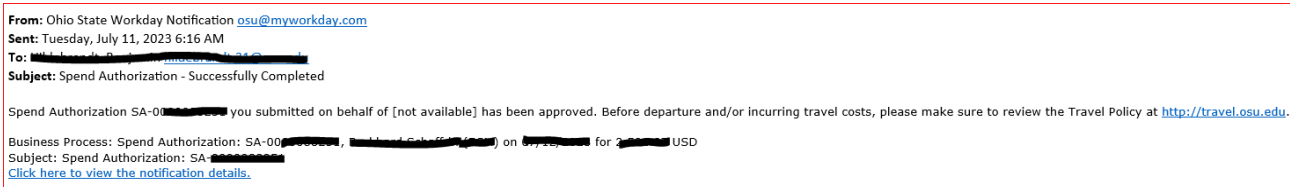
- Flight purchases need to be made through Corporate Travel Planners (CTP). You can purchase your airfare by calling CTP customer service phone line or by logging on to Concur (Book Travel Online).
- If you go through Concur (Book Travel Online), you will need to select "AIRFARE PREPAYMENT" as your payment method, Confirm your flight details and for your travel and enter the approved SA to finalize your purchase.
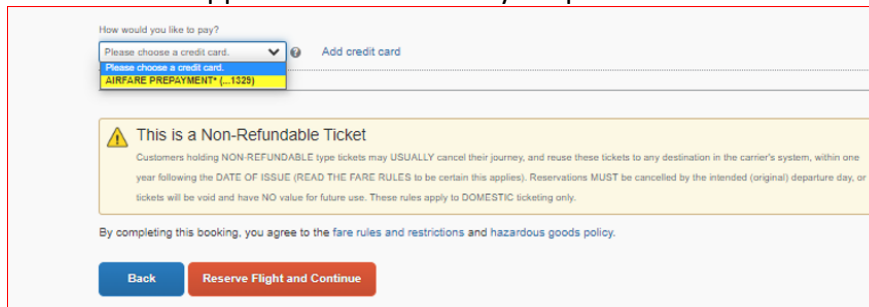
Friday, October 21, 2022

Flight   **Long Beach, CA** (LGB) to **Denver, CO** (DEN)   Change | Cancel all Air

Southwest 1690

Departure: 02:55 PM   Confirmation: 4JIHNR   Seat: No seat
Long Beach Airport (LGB)   Status: Booked directly in Southwest
Duration: 2 hours, 15 minutes   /4JIHNR
Nonstop

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

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

Departure: 07:55 PM   Confirmation: 4JIHNR   Seat: No seat
Denver Intl Airport (DEN)   Status: Booked directly in Southwest
Duration: 2 hours, 40 minutes   /4JIHNR
Nonstop

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]

SAP Concur ⒞   Travel   App Center   Help ▾
                                                                            Profile ▾ 👤

Travel   Trip Library   Templates   Tools

TRIP SUMMARY

✓ **Finalize Trip**
   ✓ Review Travel Details
   Enter Trip Information
   Submit Trip Confirmation

Trip Booking Information

- **The Itinerary Summary and Confirmed/Ticketed emails will follow completion of this booking by clicking Next>> (below) and following any additional prompts.**
- **Reservation may be held by clicking 'Hold Trip' button below. Note the time available for HOLD below.**
- **To comply with university policy, an approved SA# will be required to finalize purchase (see SA# field below).**

The trip name and description are for your record keeping convenience. If you have any special requests for the travel agent, please enter them into the agent comments section.

Trip Name   **Trip Description** (optional)
This will appear in your upcoming trip list.   Used to identify the trip purpose

[Trip from Columbus to Los Angeles]   [   ]

Comments for the Travel Agent (optional)
Special Requests may incur a higher service fee.

[   ]   Send a copy of the confirmation to: ⓘ
                                    [   ]
                                    Send my email confirmation as
                                    ⦿ HTML ◯ Plain-text

Please provide a valid/approved SA# for travel (example... SA-##########)   Do you have an unused ticket in your profile you would like to use? [Required]
[Required]
[   ]   [▾]

You may HOLD this reservation until: 08/04/2022 12:59 am Eastern

Please enter information about this trip then press Next to finalize your reservation. 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.

[Display Trip] [Hold Trip] [<< Previous] [Next >>] [Cancel Trip]

Vacation or personal vacation time combined with business/research travel?
- List any personal time you are taking on the Spend Authorization
- Your departure/return should be from/to CMH. If for some reason you are departing/returning to an alternative location, please list on the SA and provide a business purpose.
- You are recommended to fill out the Travel Comparison Worksheet for your flight if your flight dates include your personal vacation time.
- If you are taking personal time you will need to purchase your flight from CTP using YOUR PERSONAL CREDIT CARD, and your flight cost will be processed as a reimbursement. When you purchase your flight get a PDF document that shows dates from CTP or CONCUR:

    Actual travel date that includes Personal time travel + business travel
    VS
    Business travel cost

    Please note the PDF document that shows business travel cost will be the document that will be used to reimburse your flight. The price quote for your business travel cost will be used to determine your reimbursement amount. So if your flight cost Personal travel + Business travel is more than Business travel, you will get reimbursed up to the flight cost of Business travel.

- If your departure/return is not from/to CMH, you will need to provide a business purpose and a cost comparison for alternative location.

Please note OSU Policy states that you should use the lowest travel options available. As rental car and flight cost is an option for travel a cost comparison will be needed for milage reimbursement. A flight cost or the daily rental car rate will be used as the max amount you can get for milage reimbursement along with GAS.

Driving instead of flying?
- Travel Comparison Worksheet is recommended 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 when you return from travel.
- 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.

Expense Report – reimbursement claim

- Expense reports are submitted through WORKDAY 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/

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:

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