SCHOOL OF EARTH SCIENCES TRAVEL INSTRUCTIONS

All Ohio State University students, staff, faculty, and guests must have an approved Spend Authorization (SA) prior to traveling when using University funds. The SA must be fully approved in Workday before the travel start date for any authorized business or research travel. Ohio State will reimburse reasonable and necessary expenses incurred during approved travel. All SA are reviewed and approved by the Earth Sciences School Manager. Additional review is completed by either the **College Service Center** **or** **Grant Award Service Center** depending on the funding source.

Prepayment and/or reimbursement for travel expenses are permitted only when the traveler has not received—and will not receive—payment for those expenses from any third party.

All business- or research-related travel expenses paid with university funds must comply with Ohio State's Expenditures, Purchasing Card, and Purchasing policies. Travelers are responsible for reviewing and understanding these requirements to ensure all expenses meet University standards.

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 will be presenting or attending a conference.
- When your advisor is supporting your research or conference travel.
- When you have been awarded a travel grant or funding, such as the Friends of Orton Hall (FOH) award.

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

- Submit a Spend Authorization (SA) in the WORKDAY SYSTEM. Detailed instructions are available on the Administrative Resource Center (ARC) website under SA-Create a Spend Authorization section. Below are key tips to follow when preparing your SA:

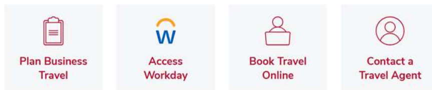
  - Attach travel quotes for anticipated expenses such as flights, hotel stays, and rental cars.
  - Include a clear business purpose using the 5 W's: Who, What, When, Where, and Why
  - Attach funding approval from your PI/Advisor or include the award documentation you received.
  - Obtain the correct funding source/Worktag from your PI, Advisor, or Award Administrator
  - For estimated hotel costs and per diem rates, use the U.S. General Services Administration website

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.

Anthony Travel is the University's designated individual business-travel agency. **Concur** is the travel-management tool provided through Anthony Travel, allowing travelers to research fares, adjust selection parameters, and finalize bookings using an approved Spend Authorization (SA) number.

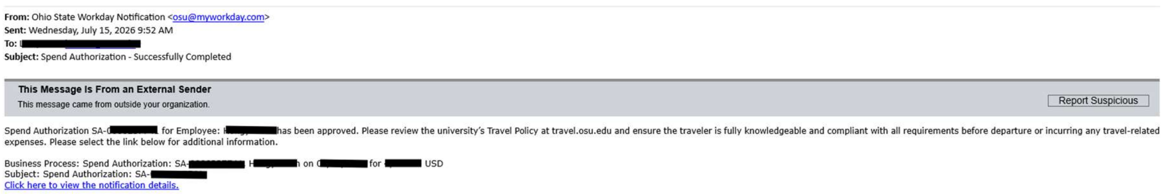
PLEASE USE the OSU Travel webpage "Book Travel Online" or "Contact a Travel Agent" to document quotes for **flights, hotels** and **rental cars** in a PDF format. Below is a guide on how to get a flight quote using the online booking tool.

- Click on "Book Travel Online"



Pre-payment:

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



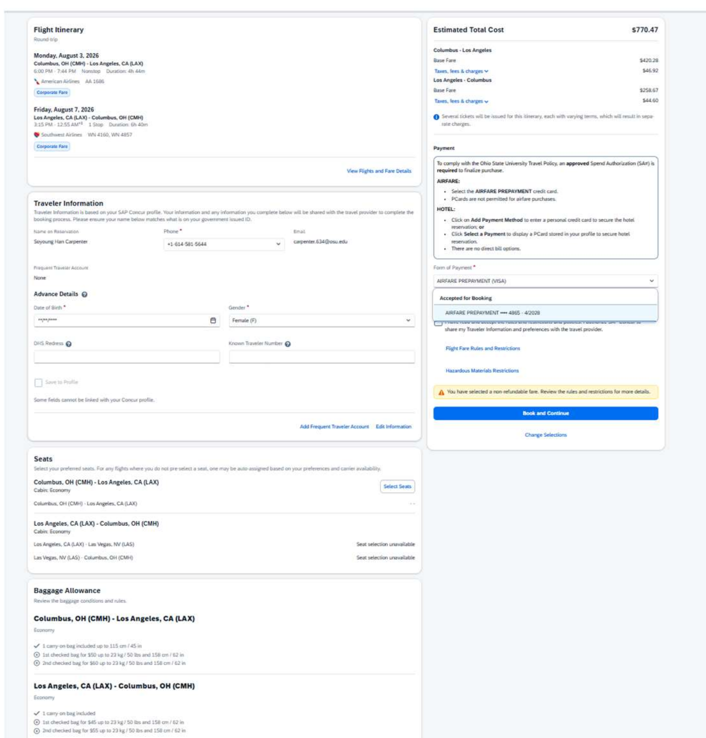
From: Ohio State Workday Notification <osu@myworkday.com>
Sent: Wednesday, July 15, 2026 9:52 AM
To: [redacted]
Subject: Spend Authorization - Successfully Completed

This Message Is From an External Sender
This message came from outside your organization.
Report Suspicious

Spend Authorization SA-[redacted] for Employee: [redacted] has been approved. Please review the university's Travel Policy at travel.osu.edu and ensure the traveler is fully knowledgeable and compliant with all requirements before departure or incurring any travel-related expenses. Please select the link below for additional information.

Business Process: Spend Authorization: SA-[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 Anthony travel. You can purchase your airfare by calling Anthony Travel customer service 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.



Vacation or Personal Time Combined with Business/Research Travel

- List any personal time you plan to take on the Spend Authorization (SA).
- Your departure and return should be from/to CMH. If you are departing from or returning to an alternative location, you must list this on the SA and provide a business purpose.
- If your flight dates include personal vacation time, you are recommended to complete the Travel Comparison Worksheet to document the cost difference.
- If you are taking personal time, you must purchase your flight through CTP using your personal credit card. The flight will then be processed as a reimbursement:
    - When purchasing your flight, obtain a PDF quote from Anthony Travel or Concur showing:
      The actual travel dates (personal + business travel)
      The business-only travel cost
    - The business-only travel cost will be used to determine your reimbursement amount. If the combined Personal + Business flight cost is higher than the Business-only cost, you will be reimbursed up to the Business-only amount.
    - If your departure/return is not from/to CMH, you must provide a business purpose and a cost comparison for the alternative location.

Please note that Ohio State policy requires travelers to use the lowest-cost travel option available. When mileage reimbursement is requested, and driving is chosen instead of flying or renting a vehicle, a cost comparison is required.

A flight quote or the daily rental-car rate and gas will be used to determine the maximum reimbursement amount for mileage. Mileage reimbursement cannot exceed the cost of the lowest reasonable travel option.

You must stay within the approved travel dates listed on your Spend Authorization, and if the travel dates change due to flight-cost differences, you must document the change in a PDF and retain the justification by keeping a cost comparison; OSU permits one day prior to the business event for domestic travel, two days prior for international travel, and one day after the business event for the return.

Driving instead of flying

- Completing the **Travel Comparison Worksheet** is recommended, along with supporting documentation, to demonstrate that driving is more economical than flying.
- The comparison must be supported with **flight cost quotes from CTP**, showing the price difference between driving and flying.

Rental Vehicles:

- Travelers are required to procure rental-car services from University-contracted rental-car agencies. Use of a non-contracted agency is permitted only under limited circumstances when it is justifiably necessary and properly documented.
- Enterprise Rent-A-Car, National Car Rental, and Hertz are Ohio State's contracted rental-car agencies. For additional details, including discounted rates and program information, please visit the 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 travelers can be reimbursed for business-related costs, including airfare, mileage, meals, and hotel expenses.

Travel and Expenditure Policies

OSU Travel **https://osutravel.osu.edu/**

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

ANTHONY TRAVEL https://busfin.osu.edu/individual-business-travel

Consult with the School Administrative Manager before submitting a Travel Request (Spend Authorization) or if you have any questions regarding OSU Travel policies, procedures, or required documentation.

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

SES (School of Earth Sciences) Financial Operations Coordinator
Luis Lara
(614)-697-3086
lara.54@osu.edu