Travel Processing Aid

In order to maximize travel & reimbursement efficiency, please review the following helpful guide.
Please submit as much supporting documentation **up front (prior to traveling) and electronically** as possible.
Please submit documents no later than **two weeks in advance of travel**.

Prior to Travel

Agenda
- If attending a conference, please attached a PDF of the agenda; if attending a meeting or event that has no official agenda, please attach an email invitation or collaborator's meeting confirmation, etc.

Registration
- Please attach your registration receipt, which must include a total amount paid and payment method.

Hotel
- The university is unable to pre-pay hotel accommodations. Please make your reservations, and attach the confirmation.
- Please note: we cannot reimburse hotel expense over the current per diem rates set by the government. To check your hotel rates against the reimbursable amount, please visit GSA's site (for domestic rates) or the US Department of State's site (for foreign rates), and enter your destination information.

Transportation
- If driving in personal vehicle, please include turn-by-turn directions (Google Maps, MapQuest) from workplace address to destination address.
- If renting a car, you MUST reserve with a university vendor and provide the OSU-discount code upon reservation. Attach reservation with total amount and OSU discount clearly displayed.
- The university can pre-pay airline tickets. Please send preferred flight options to jeter.7@osu.edu and request booking. If purchasing flights to be reimbursed, you may only book Economy seats unless you have an oversees leg totaling more than 5 consecutive hours--not including layovers.

  Travel Comparison Form [conditional]
- If you choose to incorporate vacation in conjunction with business travel, you must fill out Section III of the linked form.
- You must fill out Section II of the form if: a) you choose to drive to a destination in which the drive exceeds 3-5 hours (as opposed to flying) OR b) if you choose to fly to a destination in which the drive time to this location is less than 3-5 hours AND does not include vacation time during travel.
- If you need to complete this form, you must send PDFs of the compared driving route or flights you are comparing against.

Pre-Trip Travel Worksheet
- With the information gathered from above, scroll down to the next pages to complete the Pre-Trip worksheet. Submit this electronically with all relevant documentation to jeter.7@osu.edu two weeks prior to travel for processing.

Request Business Leave
- Request business travel leave at busleave.osu.edu; request vacation leave at eleave.osu.edu if necessary.
- If adding vacation time to a trip, everything must be paid by you and only reimbursed after your return.

Post Travel

Travel Changes & Receipts
- If travel or vacation information changed at all during the course of your trip, please contact me immediately.
  - *Example*: major flight delays resulting in a late arrival home. This can change per diem in your favor if you are stuck in an airport for an extra half day, because it likely resulted in your purchase of an additional, unplanned meal.
- Please submit itemized receipts for hotel, cabs, parking, airline baggage, etc.
- Meals are typically per-diem, and do not require individual receipts.

Reimbursement Approval & Your Signature
- After your reimbursement is submitted, it is sent to the Business Service Center, where it can take up to two weeks to be reviewed depending on volume.
- Once approved, the BSC will email you, asking you to accept the reimbursement. Your money is on its way!

The Ohio State University
Pre-Trip Worksheet (eTravel System)

- This worksheet is used to help organize a traveler's pre-trip planning and subsequent entry into the eTravel System.
- **Please submit electronically to jeter.7@osu.edu:**
  1. Download & save to your computer **2.** Fill out to best of your ability **3.** Save completed copy **4.** Email to jeter.7@osu.edu with any relevant travel docs.

TRAVELER INFORMATION

Traveler Name:		Travel Type (as applicable): ☐ Group ☐ Blanket	
Affiliation: ☐ Faculty/Staff	Employee ID:	Vendor ID:	
☐ Student or ☐ Non-University	Email:		Phone:

BUSINESS PURPOSE

Funding Source (optional):

TRAVEL LOCATIONS (include any additional date/destination detail at bottom of page 2)

Departure Date/Time:		Return Date/Time:
Departure City/State/Country:		
Destination City/State/Country:	Destination 1	
	Destination 2	

ESTIMATED COST DETAIL (see page 2 to add additional cost detail)

Transportation (Air)	$	Other	$
Transportation (Other)	$	Other	$
Meals	$	Third Party Payment	$
Lodging	$	NOTE: Third Party Payment amount should be entered as a negative in order to be deducted from total estimated cost.	
Registration	$	Total Estimated Cost	**$0.00**
		Trip Maximum (if applicable)	

TRAVEL CHARTFIELD DETAIL (see page 2 to add additional chartfield detail)

BU GL	Org	Fund	Account	Project	Program	UserDefined	Max Amt	Percent	Est Amt
							$	%	$
							$	%	$

PRE-TRIP PAYMENTS TO BE PROCESSED IN THE eTRAVEL SYSTEM (see page 2 to add additional pre-trip payment detail)

☐ *Prepaid Airfare

$	Agency Name:		Record Locator:	(optional)
	Ticket Name:			

☐ Registration Fee (eTravel System Entry Instructions: Enter details shown below in the Payment Request)

$	Vendor ID:
☐ Mail check	Payee Name (check issued to):
☐ Hold Check	Payee Mailing Address:

☐ Cash Advance (eTravel System Entry Instructions: Enter details shown below in the Payment Request)

$	Note: Traveler must sign the Cash Advance Form generated in the eTravel System prior to receiving cash advance.

Eligibility Criteria:
☐ Student Traveler   ☐ Faculty/Staff International Travel
☐ Faculty/Staff Student Group Advisor   ☐ Eligibility Exception (Dean/VP approval)

APPROVAL (optional – this section should be used as deemed necessary by the using department)

Approval Signature: _____   Date: _____

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