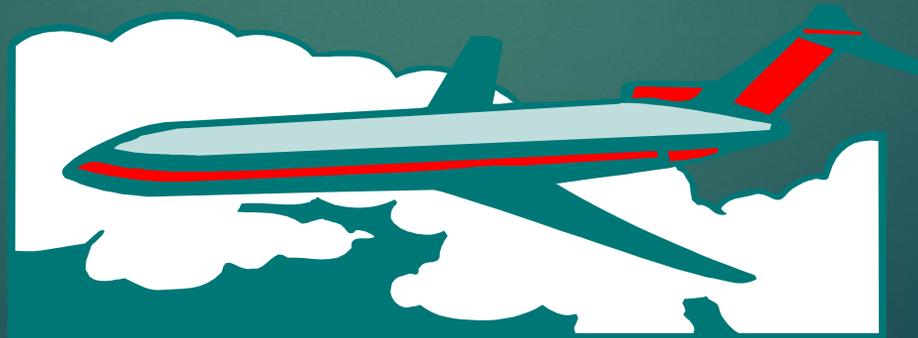




# Travel Training

PLEASE LOG INTO YOUR WORKSTATION



# Roles Defined



## **Traveler:**

Person traveling on behalf of Western

## **Data Entry Delegate:**

Can enter data for a traveler

## **Supervisory Approver/Default Approver or Manager:**

Approves the travel purpose  
and time away

## **Cost Object Approver:**

Approves the dollar expenditure

## **Approver Delegate/Proxy Approver:**

May approve on behalf of another  
approver

## **Previewer:** Reviews before an approver

## **Alternate Approver:**

Approves when a cost object  
approver travels using their own budget

# Please Keep In Mind

Travelers or their delegates  
can do the data-entry.

**However, the Traveler is  
responsible for reviewing the  
information for accuracy and  
submitting all documents  
in a timely manner.**

# Types of Travel Documents

**Request** = Pre-trip Authorization

*Note: Your College may have additional prerequisites.*

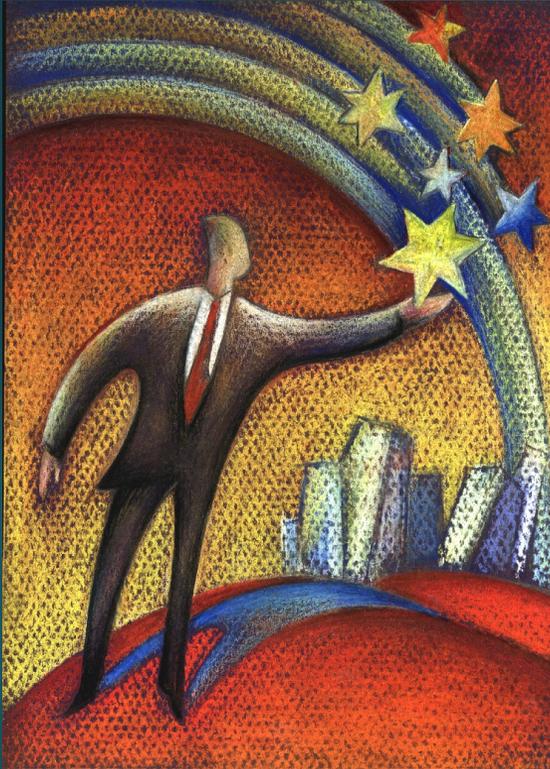
**Expense** = Expense Report

Or Travel Reimbursement

# Travel Authorization Request

- ▶ Required for all in-state travel that will be reimbursed
- ▶ Required for all out of state travel, including trips at no cost to Western
- ▶ Is a “Best Guess Estimate” of expenses
- ▶ Should be submitted as soon as possible
- ▶ **Must be fully approved before arrangements and expenditures. Note: Reimbursements for trips that are not authorized may be denied.**
- ▶ Blanket travel authorizations cover multiple in-state trips for the same purpose, such as weekly site visits.

# Travel Authorization and Reimbursement



- ▶ **All Reimbursements require a Travel Authorization.**
- ▶ Generate your Expense Report directly from your approved Travel Authorization Request.
- ▶ Reimbursements pay out Tuesdays and Fridays
- ▶ System stores receipts (both reimbursable and Pcard/direct-paid) & related documents

# Clearly state the Business Purpose

- ▶ Spell out Acronyms
- ▶ Include a brief explanation of how the trip relates to your work
- ▶ If you have a department pre-authorization form be sure to reference or attach it



# Select the most economical method of travel



- *Exercise the same care when incurring expenses that a prudent person would when traveling on personal business.*
  - For example: Is it less expensive to drive my own car and claim mileage, or take the train? Can I carpool with a colleague?

# Approval Process

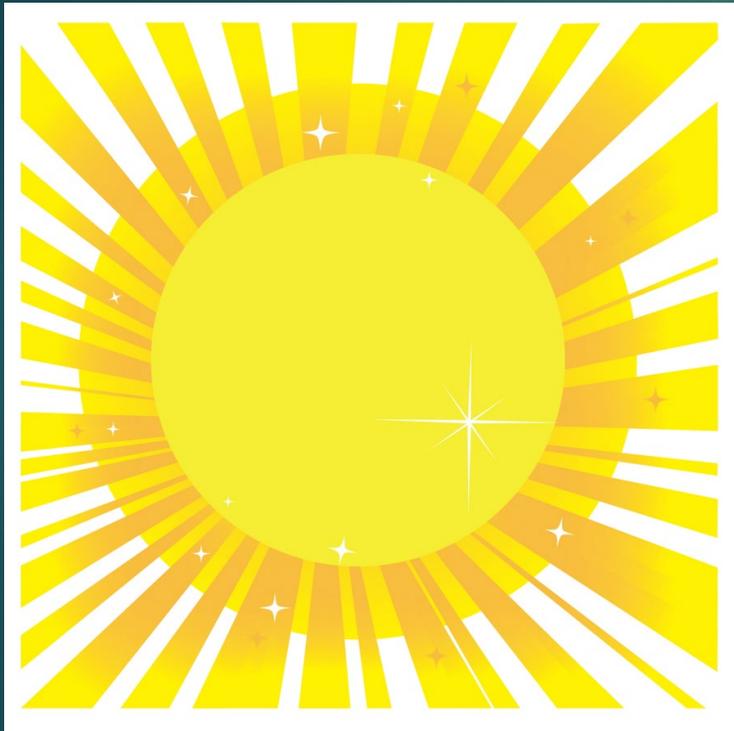
Approvals flow automatically from one approver to the next:

1. **Travel Services**: Reviews for university, state, & federal policy and procedure compliance
2. **Supervisory**: Approves the business purpose & time away from regular work station
3. **Budget/Cost Object**: Approves expenses

▶ *Grant Funds require an additional approval step*



# Per Diem vs. Actual - Meals



- ▶ Rates are Destination Based
- ▶ Meals Per Diem do not need receipts
- ▶ “Actual” meals require detailed receipts and may not exceed per diem rates

# Day Trip Meals are Taxable



***Please Note:*** You are eligible to be reimbursed for meals on day trips if **total travel time meets or exceeds 11 hours**

- ▶ “Day Trip Meals – Taxable” expense type
- ▶ Per diem meal rates still apply



# Avoid Paying Unnecessary Taxes!

- ▶ Reimbursements submitted 60 days or more after travel are taxable.
- ▶ The 60 days begins at the end of your trip.
- ▶ This timeline is based on when the report is first submitted in Concur by the traveler.

# Mixing Business and Personal Travel

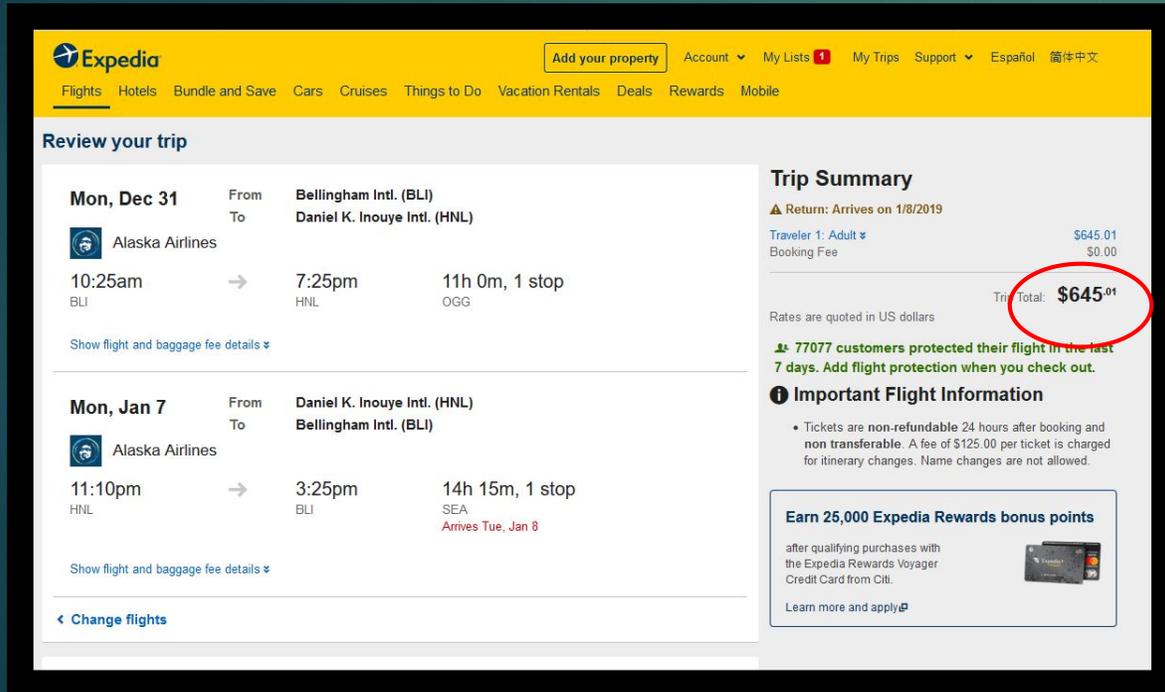
If a traveler would like to add vacation or other personal use onto a legitimate business trip, it is allowed when all of the following conditions are met:

- ✓ **The primary purpose of the trip is official state business;**
  - ✓ **The traveler uses, where necessary, his or her approved leave for the vacation or personal part of the trip; and**
  - ✓ **The state agency does not incur any extra expenses beyond what it would normally incur had the trip occurred without any personal use coupled to the trip.**
- Personal days should be noted in the Request and Expense Report.
  - Enterprise car rentals must be split. The state contract rates may only be used for business dates.
  - Parking and other expenses must be prorated

# Mixing Business and Personal Travel

## Business Flight Quote

## Actual Flight Receipt



The screenshot shows a business flight quote on Expedia. The itinerary includes two flights: one on Dec 31 from Bellingham Intl. (BLI) to Daniel K. Inouye Intl. (HNL) on Alaska Airlines, and another on Jan 7 from Daniel K. Inouye Intl. (HNL) to Bellingham Intl. (BLI) on Alaska Airlines. The total price is \$645.01, with a \$0.00 booking fee. A red circle highlights the total price of \$645.01.

**Review your trip**

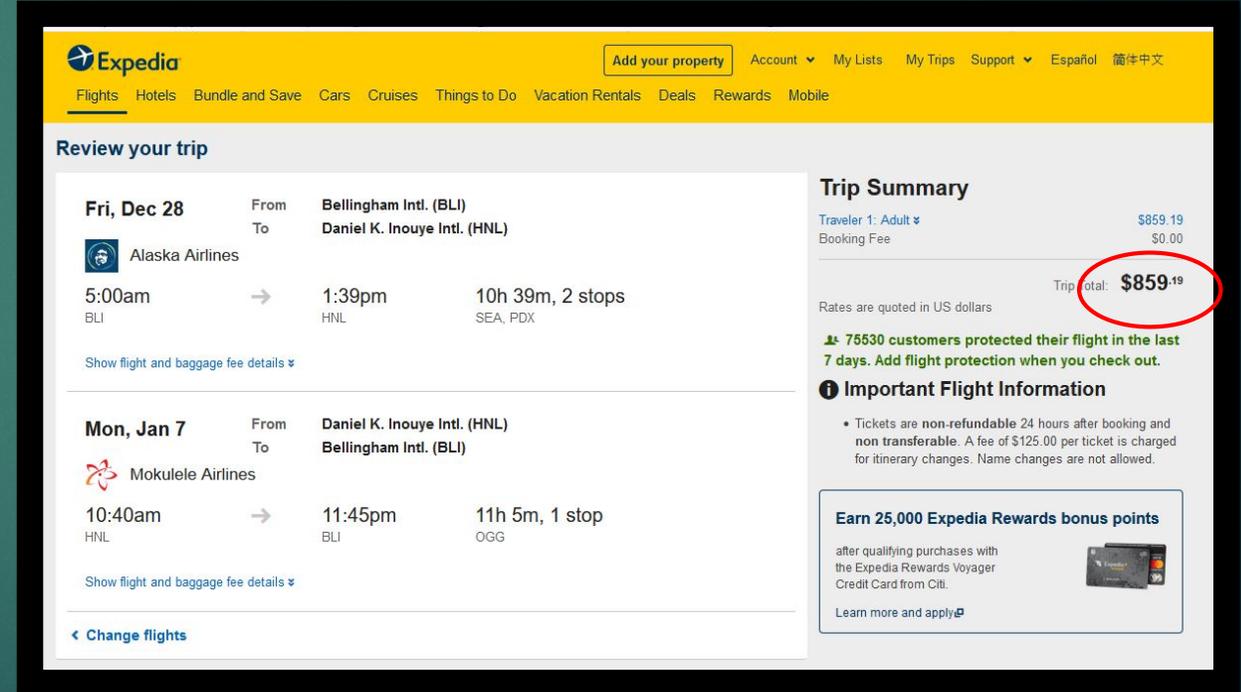
**Mon, Dec 31** From **Bellingham Intl. (BLI)** To **Daniel K. Inouye Intl. (HNL)**  
Alaska Airlines  
10:25am BLI → 7:25pm HNL 11h 0m, 1 stop OGG

**Mon, Jan 7** From **Daniel K. Inouye Intl. (HNL)** To **Bellingham Intl. (BLI)**  
Alaska Airlines  
11:10pm HNL → 3:25pm BLI 14h 15m, 1 stop SEA  
Arrives Tue, Jan 8

**Trip Summary**  
Return: Arrives on 1/8/2019  
Traveler 1: Adult \$645.01  
Booking Fee \$0.00  
Trip Total: **\$645.01**

**Important Flight Information**  
• Tickets are non-refundable 24 hours after booking and non transferable. A fee of \$125.00 per ticket is charged for itinerary changes. Name changes are not allowed.

**Earn 25,000 Expedia Rewards bonus points**  
after qualifying purchases with the Expedia Rewards Voyager Credit Card from Citi.



The screenshot shows an actual flight receipt on Expedia. The itinerary includes two flights: one on Dec 28 from Bellingham Intl. (BLI) to Daniel K. Inouye Intl. (HNL) on Alaska Airlines, and another on Jan 7 from Daniel K. Inouye Intl. (HNL) to Bellingham Intl. (BLI) on Mokulele Airlines. The total price is \$859.19, with a \$0.00 booking fee. A red circle highlights the total price of \$859.19.

**Review your trip**

**Fri, Dec 28** From **Bellingham Intl. (BLI)** To **Daniel K. Inouye Intl. (HNL)**  
Alaska Airlines  
5:00am BLI → 1:39pm HNL 10h 39m, 2 stops SEA, PDX

**Mon, Jan 7** From **Daniel K. Inouye Intl. (HNL)** To **Bellingham Intl. (BLI)**  
Mokulele Airlines  
10:40am HNL → 11:45pm BLI 11h 5m, 1 stop OGG

**Trip Summary**  
Traveler 1: Adult \$859.19  
Booking Fee \$0.00  
Trip Total: **\$859.19**

**Important Flight Information**  
• Tickets are non-refundable 24 hours after booking and non transferable. A fee of \$125.00 per ticket is charged for itinerary changes. Name changes are not allowed.

**Earn 25,000 Expedia Rewards bonus points**  
after qualifying purchases with the Expedia Rewards Voyager Credit Card from Citi.

Flight quotes must be provided reflecting the business travel itinerary and be obtained on the date of purchase for the actual flight

Questions? Please contact:  
Sally Parsons or Angela Tran  
x 3341

[Travel.Services@wwu.edu](mailto:Travel.Services@wwu.edu)

