Travel Training

PLEASE LOG INTO YOUR WORKSTATION
Please Keep In Mind

Travelers or their delegates can do data-entry.

Only travelers can submit A Request or Expense for approval.
Roles Defined

**Traveler:**
Person traveling on behalf of Western Delegate

**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

**Delegate Approver:**
May approve on behalf of another approver

**Previewer:** Reviews on behalf of an approver

**Alternate Approver:**
Approves for a budget authority approver traveling on their own budget.
Types of Travel Documents

Request = Pre-trip Authorization
Expense = Expense Report
Or Travel Reimbursement
Request: Travel Authorization

- Should be submitted as soon as you know you will travel
- Are “Best Guess Estimates” of expenses
- Must be completely approved before expenditures
- May request a blanket TA for frequent regular travel
Travel Authorization and Reimbursement

- All Reimbursements require a Travel Authorization.
- Generate your Expense Report directly from your approved Request.
- Reimbursements pay out Tuesdays and Fridays
- System stores receipts & related documents
Approval Process

Approvals flow automatically from one approver to the next.

Documents go through three stages of approval:

1. **Travel Services**: Ensures no violations of travel policy
2. **Supervisory**: Approves the business purpose & time away from regular work station
3. **Budget authority**: Approves estimated expenses

- Anyone may add approvers at any step
- **Grant and Foundation Funds** require an additional approval step

Approver listings available here: [Travel Approver Lists](#)
Request: Be Clear About The Business Purpose

- Spell out Acronyms
- Include a brief explanation in the Travel Justification section to clarify how the trip relates to your work.
- If you have a department pre-authorization form be sure to reference or attach it.
Concur Does the Work!

- Automatic calculation of per diem & mileage rates
- Automatic currency conversion
- Connects Expense Reports to Requests
- Pre-defined routing for approvals
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 travel time meets or exceeds 11 hours.

- “Day Trip Meals – Taxable” expense type
- Per diem meal rates still apply
Avoid Paying Unnecessary Taxes

- Reimbursements requested 60 days after travel are taxable.
- The 60 days begins at the end of your trip.
- This timeline is not affected by returns.
- If you submit your expense report after 60 days please change all expense types to “Taxable Reimbursement – Over 60 Days” and note the expense in the description.
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
Flight quotes must be provided reflecting the business travel itinerary and must 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