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
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:
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