

# SENR PRE-TRAVEL WORKSHEET

This form requires a **minimum of 3 business days' lead time prior to trip**

It should be used to provide trip detail and approval. **Travel policy requires pre-approval for all trips including estimated cost.**

**Deviation from standard travel arrangements requires explanation** with timely, **prior documentation comparing costs**. Please select & initial if applicable, indicating comparisons have been printed or saved to PDF. Note that OSU will reimburse only the most economical amount.

car rental or mileage reimbursement in place of airfare

\_\_\_\_\_ *initials*

personal time added to business travel (flight dates vary from business dates)

\_\_\_\_\_ *initials*

multi-city trips, or destinations outside of business purpose/OSU/"home"

\_\_\_\_\_ *initials*

GENERAL INFORMATION				
Traveler Name:	_____			
OSU Affiliation:	<input type="checkbox"/> Faculty	<input type="checkbox"/> Staff	<input type="checkbox"/> Student	<input type="checkbox"/> non-OSU
	<b>City</b>	<b>State (or Country)</b>	<b>Date</b>	<b>Time</b>
Departure Site:	_____	_____	_____	_____
Destination(s):	_____	_____	_____	_____
Return Site:	_____	_____	_____	_____

BUSINESS PURPOSE OF TRIP	Be as specific as possible. Avoid abbreviations.

ESTIMATED COST OF TRIP		List all expenses regardless of payment method.		
Type	Amount to be Reimbursed	PCard/GET Card	Prepaid Expense	Notes
Meals				
Airfare				
Registration				
Lodging				
Internet				
Transportation				
- Rental Car				
- Fuel				
- Mileage: # of Miles: @ /mile				
- Taxi				
- Shuttle				
- Other				
- Parking				
- Tolls				
Business Meals				
Other:				
<b>TOTAL</b>				

**CHARTFIELD INFORMATION**

UNIV/OSP	Cost Center	Fund	PROJECT/ GRANT	PROGRAM	Add. Worktags	

**AUTHORIZATION**

*By signing, I acknowledge that the business purpose and estimated expenses as written on this form are appropriate and authorized.*

Org Authorizer (print): \_\_\_\_\_

Org Authorizer Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## **Travel Information and Policy Reminders**

1. Travelers need to familiarize themselves with the travel policies prior to making travel arrangements.
2. All invited guests need to be made aware of the travel policies and their related expenses must comply.
3. A Travel Request must be submitted and approved prior to date of departure. Any travel reimbursements that were not pre-approved will be denied. It is the traveler's responsibility to confirm that a Travel Request has been approved before traveling.
4. Original receipts are required, and must be itemized and show payment received. This may require two receipts for one transaction.
5. The following policies are provided as reminders of those most commonly encountered, and are not to the exclusion of other policies.

### **TRANSPORTATION**

#### **Airfare**

Approved Travel Agency: Corporate Travel Planners (1-855-784-9282, [theohiostate@ctp-travel.com](mailto:theohiostate@ctp-travel.com))

**Airfare expenses are to be prepaid.** Department personnel will reserve airfare via the University-approved travel agency. Provide details of preferred flights times, airports, etc., and a flight best matching those details will be identified. To ensure airfare is booked at the quoted price, submit pre-travel paperwork no later than 1:00pm on the day of the quote.

See important information below for travel dates in conjunction with vacation/personal time.

Federally funded research requires the use of U.S. Flag Air Carriers for international travel.

#### **Rental Car**

Approved Travel Agency: Corporate Travel Planners (CTP) 1-855-784-9282, [theohiostate@ctp-travel.com](mailto:theohiostate@ctp-travel.com)

**Rental car reservation must be made via the University-approved travel agency, but expense will be reimbursed after travel (not prepaid by OSU).** Use of a rental vehicle as a primary mode of travel transportation is authorized only if renting a vehicle and driving is more economical than any other type of transportation or if the destination is not otherwise accessible. Documentation (e.g. airfare quote) is required to demonstrate cost comparison when considering vehicle rental over flying.

#### **Personal Auto**

Mileage will be reimbursed as a primary mode of transportation only if the cost does not exceed the least expensive airfare. Documentation (e.g. airfare quote) is required to demonstrate cost comparison when considering driving over flying. Reimbursement is based on the federal mileage rate. MapQuest or Google Maps will be used to calculate the mileage.

#### **Other Transportation**

Original receipts are required for taxi, bus, subway, metro, ferry and other modes of transportation if costs are \$50.00 or more for each occurrence.

### **MEALS**

After trip completion, meals will be reimbursed using the federal per diem rate for in-state overnight travel or out-of-state travel that is 45 miles or more from the traveler's home or primary work site. If a meal is included in a conference registration fee, served on a plane, included in a hotel rate, etc., the per diem allowance for that meal cannot be claimed. University business meals (if applicable) must be pre-approved, and receipts for these meals must be accompanied by a detailed business purpose, a list of all attendees, and their relationship to the business discussion.

### **LODGING**

Lodging is reimbursed at reasonable, single occupancy or standard business room rates. Cost must not exceed either the conference rate at the conference/convention site or twice the federal lodging rate for the business travel location. If the receipt shows more than a single occupancy, the single room rate must be documented, and each traveler should request a separate receipt addressed to him/her that shows his/her portion of the paid bill.

### **OTHER EXPENSES**

Original, itemized receipts are required for each expense (e.g. parking, tolls, baggage fees) in excess of \$50.00.

### **VACATION IN CONJUNCTION**

When vacation or personal time is added to business travel, a cost comparison must be provided to show if the additional time does or does not increase the costs of travel-related expenses. This cost comparison must use quotes completed on the same day in order to be valid.

\*In cases where increased costs are shown, the travel agent will split the transaction at time of airfare purchase between the business payment method and a personal credit card for the additional cost due to vacation (with select airlines).

**HELPFUL LINKS:** OSU travel policy: [https://busfin.osu.edu/sites/default/files/211\\_travel.pdf](https://busfin.osu.edu/sites/default/files/211_travel.pdf)  
 Federal per diem rates: <http://www.gsa.gov/portal/content/104877>  
 Federal mileage rate: <http://www.gsa.gov/portal/content/100715>